

Appendix 5 Exeter City Council Max Associates Strategic Outcomes Planning Model Proposal



EXETER CITY COUNCIL

Strategic Outcomes Planning Model Guidance

A strategic approach to sport and physical activity that supports local priorities

September 2019



Appendix 5 Max Associates Strategic Outcomes Planning Model Proposal

1. Introduction

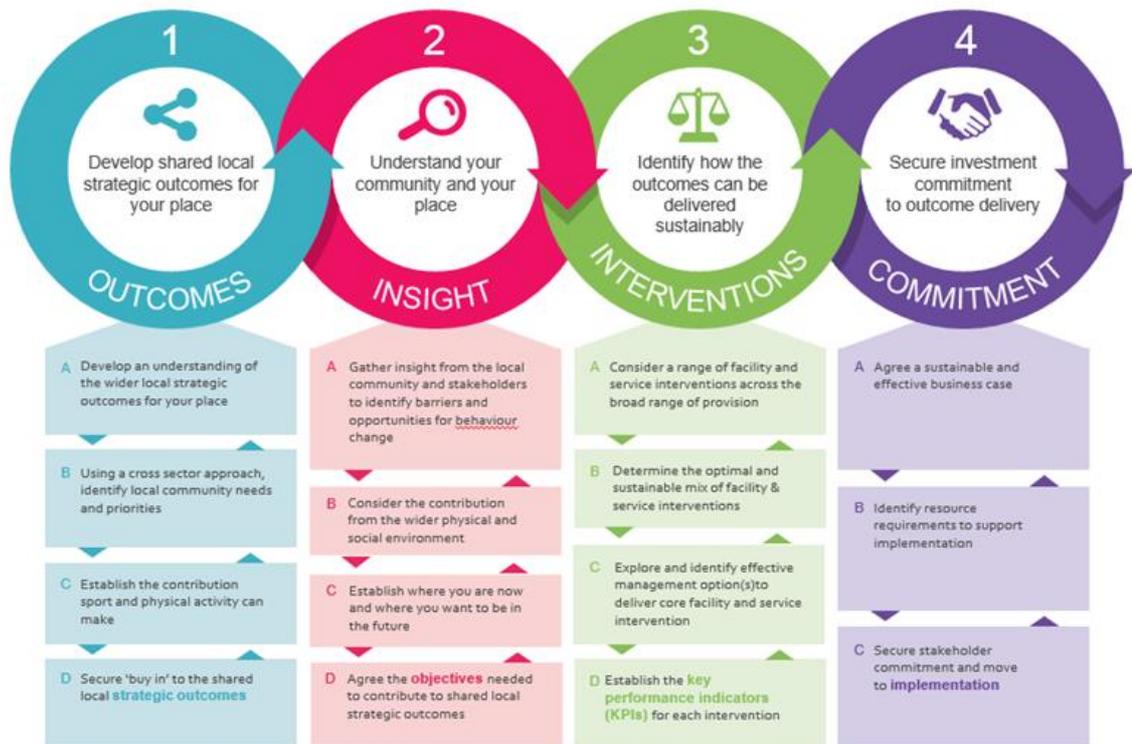
- 1.1. Max Associates is delighted to provide guidance to develop a Sport England Strategic Outcomes Planning Model and strategic options appraisal / framework to drive and inform decisions required by Exeter City Council to deliver longer-term sustainable investment to Wonford Sports Centre.

2. Methodology

- 2.1. To develop the Strategic Outcomes Delivery Model, we have set out an overview of the methodology with further detail in the following pages.
- 2.2. Our approach and methodology has been based on meeting the new Sport England guidance for funding such schemes. Key features which applications will be expected to demonstrate are:
 - A clear strategic vision and planned approach focused on local outcomes (cross-sector collaboration, health, leisure, social services, libraries, crime prevention etc);
 - Utilisation of local insight to identify the target audiences, the behaviour change required and how to achieve this;
 - Clarity on how sport and physical activity can impact on achieving the outcomes;
 - A facility mix which has been developed through a thorough understanding of the target audience and behaviour change;
 - A cost effective build and financially sustainable operating model;
 - Integrated service facility offer (co-location where appropriate);
 - A facility that provides the potential to deliver the identified outcomes;
 - An operating contract that can deliver the desired outcomes; and,
 - An effective data analysis system to evaluate performance and assess achievement of outcomes

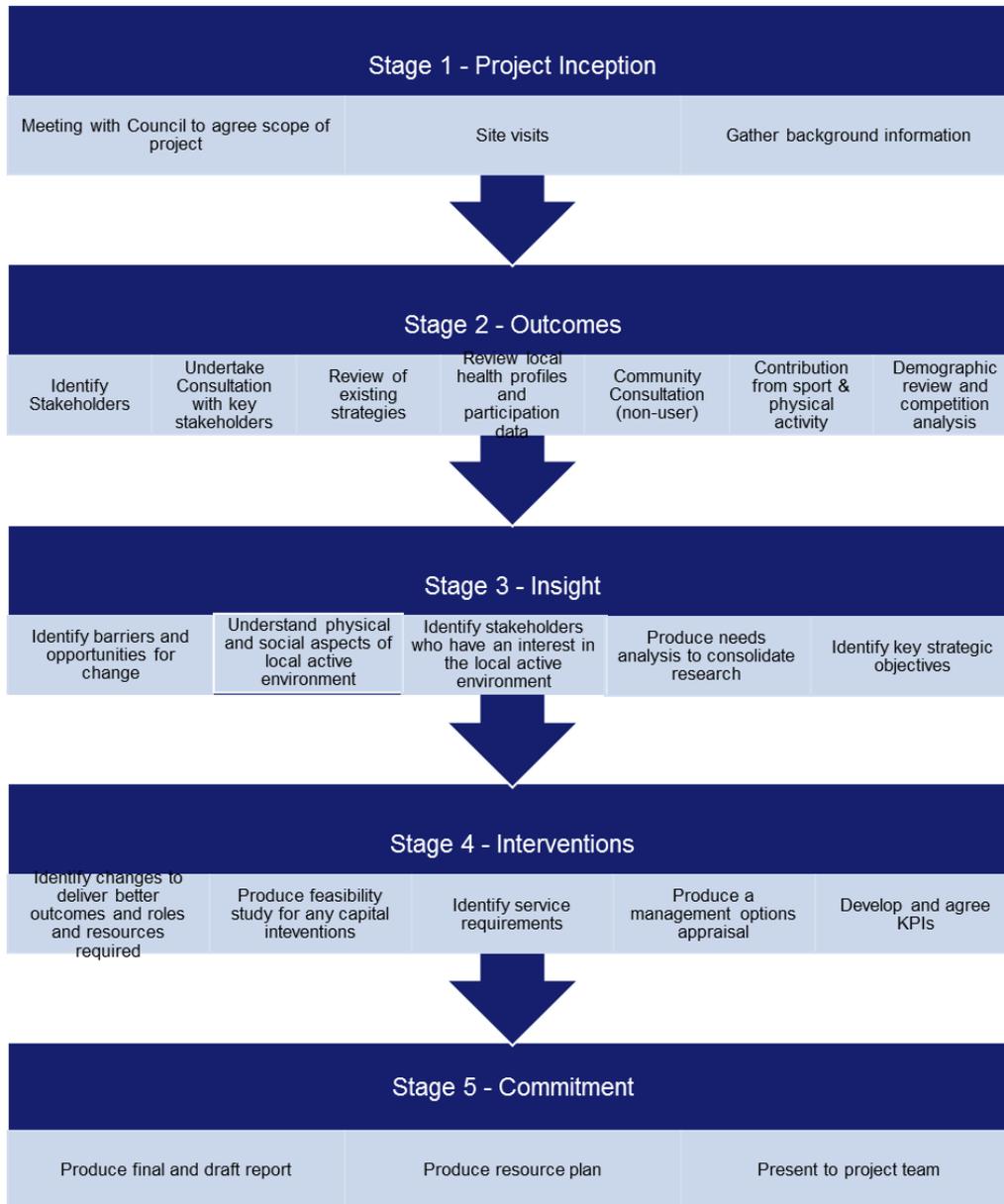
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Figure 1 – Sport England Strategic Outcomes Planning Model



2.3. This approach is systematic and evidenced based for any investment in new facilities or services and builds in opportunities to ensure 'buy-in' from senior officers and elected members. It will provide both options of new facility investment and also key service interventions that can be built into the new leisure specification. Finally, the approach will be aligned to SE strategy and will support any strategic funding applications.

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2.4. Stage 1 – Project Inception

2.4.1. Our starting point for this project will be for a project inception meeting with officers from the Council to fully agree the scope of stakeholders and to explore further the existing strategies currently in place and to agree timelines for actions.

2.4.2. The team will take the opportunity to visit the proposed sites and identify all the background information that is available in respect to the services. Contacts and key stakeholders will be agreed, along with the approach to any public consultation that is required.

2.5. Stage 2 – Outcomes

2.5.1. We understand that much of the work below has been completed by the Council and we will simply review the information and identify the gaps:

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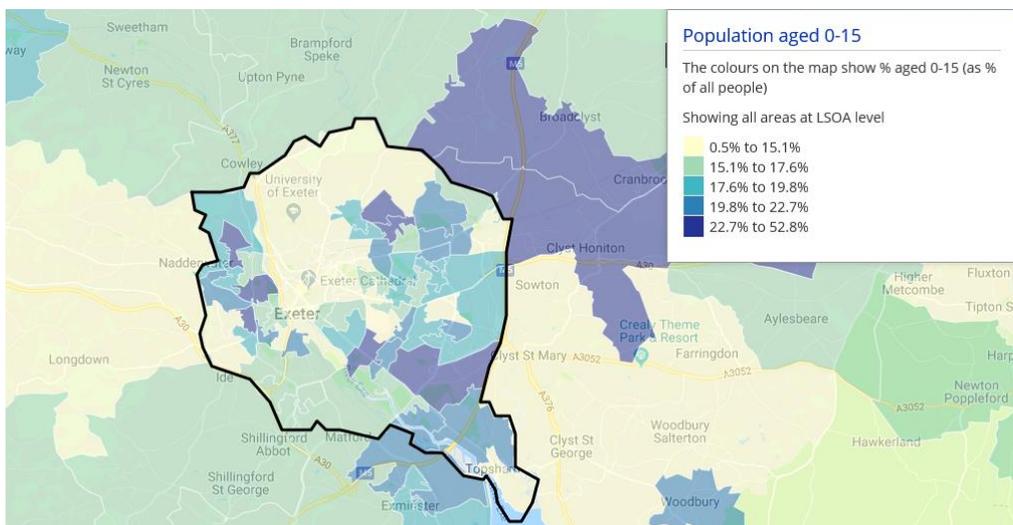
2.5.2. **Review of existing strategies** - review of the relevant existing strategies, e.g. Exeter Move More Strategy and analysis of data available on health and participation and demographics to understand local community needs and priorities.

2.5.3. **Council and key stakeholder priorities** – review of existing strategic documents to identify the main shared priorities and opportunities for shared services.

2.5.4. **Demographic review** - Analyse the demographics of the catchment of the facilities. We will undertake a desktop review of data regarding future population increases and any planned housing developments within the catchment area and apply good practice standards as applicable. We will utilise the Sport England Insight Data to inform the demographic review and produce relevant population maps, an example is shown below, demonstrating the % of the population that is aged 0-15 years and how this compares to surrounding council areas.

Figure 2 - Sport England Insight Tool Examples

Finding your way around this Local Insight profile		2
Introduction Page 3 for an introduction to this report		
 <p>Population</p>	<p>There are 128,915 people living in Exeter</p> <p>See pages 4-9 for more information on population by age and gender, ethnicity, country of birth, language, migration, household composition and religion</p>	 <p>Education & skills</p>
 <p>Vulnerable groups</p>	<p>13% of children are living in poverty in Exeter compared with 17% across England</p> <p>See pages 10-23 for more information on children in poverty, people out of work, people in deprived areas, disability, pensioners and other vulnerable groups</p>	 <p>Economy</p>
 <p>Housing</p>	<p>5% of households lack central heating in Exeter compared with 3% across England</p> <p>See pages 24-33 for more information on dwelling types, housing tenure, affordability, overcrowding, age of dwelling and communal establishments</p>	 <p>Access & transport</p>
 <p>Crime & safety</p>	<p>The overall crime rate is lower than the average across England</p> <p>See pages 34-35 for more information on recorded crime and crime rates</p>	 <p>Communities & environment</p>
 <p>Health & wellbeing</p>	<p>17% of people have a limiting long-term illness in Exeter compared with 18% across England</p> <p>See pages 36-44 for more information on limited long-term illness, life expectancy and mortality, general health and healthy lifestyles</p>	<p>Appendix A</p> <p>Page 65 for information on the geographies used in this report, publication dates for new indicators and acknowledgements.</p>



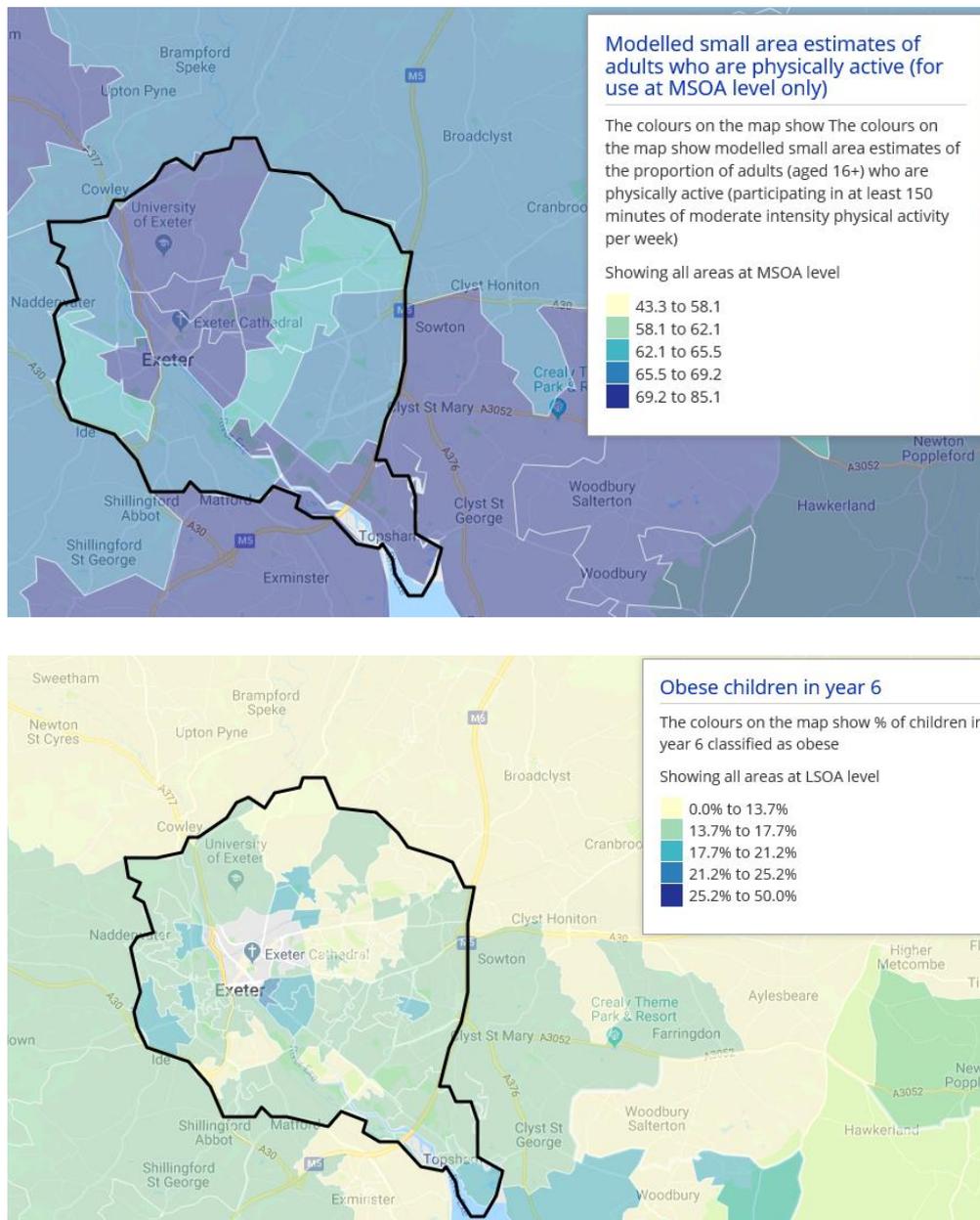
2.5.5. **Latent demand reports** – Will be commissioned from Leisure Database Company to understand the total demand for fitness across the existing leisure centres, it will identify

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opportunities for growth in fitness membership. As part of this process existing members will be mapped to demonstrate where members live in relation to the centres.

2.5.6. Review of health and participation data – We will review available health profiles to identify health inequalities and issues in the borough. We will also review rates of participation in physical activity utilising Sport England data such as the Active Lives survey results. We will also utilise the mapping available on Sport England Insight tool to demonstrate rates of inactivity/activity and health factors against neighbouring local authorities as shown in the examples below.

Figure 3 - Sport England Insight Tool - Health & Participation Maps



2.5.7. Competition analysis – We will undertake a review of all traditional and commercial leisure provision in the area to identify any opportunities for additional facilities that will increase participation in physical activity but are not already provided in the borough.

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2.5.8. Understanding local need: stakeholder and public consultation –During this stage, we will:

- Consult with National Governing Bodies of Sport and local sports clubs;
- Engage with local stakeholders and partners, existing facility user groups, health professionals;
- Review the level of physical activity for residents of Exeter;
- Consider the health indicators of people in Exeter;
- Undertake non-user consultation to understand why people do not use current facilities.

2.6. The findings from the public consultation along with the feedback from local sports clubs and the data available from public health will collectively inform the local need for facilities and services related to sport and physical activity.

2.6.1. If however, further community / non-user consultation is required, we would work with Leisure-net Solutions a leading leisure consultation company to deliver the following consultation. (This is costed for separately depending on whether the Council chooses to go ahead with this).

2.6.2. Online “have your say” resident survey

2.6.3. An online survey for members of the community to complete, (target of 400-500 completions), asking questions about awareness, barriers, encouragement factors etc. Client to help promote through local papers, websites etc. and it would be useful if the local Citizens Panel could also be involved. There is the opportunity to add in specific questions to meet local priorities into the survey questionnaire.

2.6.4. Face to face community/non-user survey

2.6.5. A 500-sample face to face street survey, carried out by Market Research Society Guidelines and trained staff. Can cover the whole community or focus on particular groups or geographical areas. Results can be benchmarked against our national benchmarks. Questions will allow us to identify different groups of people at different stages of the Sport England Behavioural Change model. It will also be informed by the online survey and the analysis of user postcodes.

2.6.6. 10 in depth Focus groups

2.6.7. To be carried out after the surveys above, in order to drill down further on the results from the surveys. They will target particular target/hard to reach groups, such as older people, BME groups, people with disabilities, Inactive young women etc, and will be recruited from the survey respondents or through local community groups

2.6.8. This element of consultation has been costed separately so the council can choose what is needed given the work that has already been undertaken.

2.6.9. The findings from public consultation along with the feedback from local sports clubs and the data available from public health will collectively inform the local need for facilities and services related to sport and physical activity.

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2.7. Stage 3 – Insight

2.7.1. Using the data and research collated in Stage 2 we will research specific local barriers by target groups and communities and identify opportunities that will support behaviour change.

2.7.2. From the consultation we will identify existing stakeholders who have an interest in the local active environment.

2.7.3. We will consolidate all of the data and research to date to produce a needs analysis, which will identify the key strategic objectives to be addressed.

2.8. Stage 4 – Interventions

2.8.1. **Identify service and facility interventions** - We will identify facility and service interventions required to meet the strategic objectives. For each of the interventions we will outline resources required.

2.8.2. The facility and service requirements will then be developed based on the local need, the opportunities for wider partnership working and collaboration.

2.8.3. During this stage, we will:

- Set out the core sports facility requirements
- Assess how the facility mix reflects current and future demand
- Highlight a long list of potential facility options
- Identify any service delivery needs and partnership opportunities
- Set out other facility and site requirements including:
 - Size and layout of activity spaces
 - Spectator requirements
 - National and regional competition requirements
 - Innovative physical activity and commercial facilities
 - Ancillary – changing and catering
- Agree with the Council which options to progress.

2.8.4. **Feasibility Studies and Revenue Business Plan Projections** - For each of the agreed intervention options Max associates will produce a feasibility study, including outline financial projections and the population impact.

2.8.5. Max Associates has a robust financial model template which is used for comparative purposes.

2.8.6. The business plans will be tested against industry benchmarks and take in consideration local pricing requirements, staffing levels and programming.

2.8.7. Max Associates has the benefit of both our own internal database of financial performance of sport and leisure facilities from across the UK, and access to information from benchmarking clubs that provide data for similar facilities.

2.8.8. In addition to this we will also produce a sensitivity analysis. This will highlight how any changes to the income or expenditure will impact the net surplus/deficit position. For example, if health and fitness income per station reduces by £1,000 or utility costs

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increase by 10%. This enables the business plan to be tested against a number of scenarios.

2.8.9. It is anticipated that the Council will require an indication of total capital costs, therefore as set out above, we have included a PC sum to present high level capital costs for each capital intervention project.

2.8.10. **Management Options** – We will provide the Council with an overview of the alternative management options along with the strengths and weaknesses of each option. This will include evaluation of the continuation of the existing operator against other options such as an external contractor and in-house management.

2.8.11. The report will set out the key differences between each option including financial differences. We will evaluate the management options against an agreed criterion which is based on the Council's outcomes.

2.8.12. The management options evaluation will identify the preferred management option. A workshop at this point is included to review the management options and agree the preferred option.

2.8.13. Key Performance Indicators – KPIs will be developed for each of the interventions to monitor and measure performance. These will be presented to and agreed with the project team.

2.9. Stage 4 - Commitment

2.9.1. **SOPM Report** - We will write up the full report, with concise information in the main body and technical information set out in detail in the appendices. The report will be presented in a user-friendly format for review and comment by the Council.

2.9.2. We will present the findings to officers and take into account comment and feedback for the final report.

2.9.3. A resource plan will be produced to implement the recommendations.

2.10. Expression of Interest (EOI)

2.10.1. Max Associates will work closely with Sport England's Capital Projects team through this process. At an appropriate stage, Sport England can identify whether a project is suitable for the Strategic Facilities Fund and request for an Expression of Interest (EOI) to be submitted. We will draft and submit an EOI demonstrating the project's ability to address the five key criteria of the fund; then Sport England will consider soliciting an application for funding (this will require Sport England's Investment Committee approval).

2.10.2. If approval is given, Sport England will formally solicit an application and an online application form will need to be completed. At an agreed development stage, the applicant will formally submit their lottery application (with detailed plans) for assessment by Sport England against the key criteria of the Strategic Facilities Fund.

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2.11. Relevant Experience

- 2.12. Max Associates is working with Trafford, South Holland, Chiltern, North Devon, Bradford, Hillingdon, Reading and Carlisle Councils to assist in the development of similar schemes and assisting with applications to Sport England for funding.
- 2.13. In addition, we are current scoping similar projects for Westminster City Council, Waltham Forest Council, Hyndburn and Stoke Councils, in partnership with Sport England.
- 2.14. Using the outcomes of the new Sport England Strategy, our approach has been to create an offer that outlines the strategic priorities for the area with a particular focus on how new or redeveloped indoor facilities can meet the wider physical activity and health outcomes.
- 2.15. While the trigger for starting these projects has been the assumption that a new facility is required, the process we have followed is underpinned by local priorities, opportunities and local need before we consider the facility requirements.
- 2.16. For the project examples above we have been commissioned to write the Strategic Outcomes Planning Model Report, liaise with Sport England and submit the expression of interest (EOI) to Sport England for Strategic Facilities Funding. The EOI has been successful in North Devon, Chiltern, Carlisle and Tameside Councils, where Sport England has ring-fenced funding and invited these authorities to progress to Stage 2 funding submissions. In Bradford work is currently progressing forward to EOI stage. For Reading public consultations are presently taking place to inform the strategic outcomes planning model and identify barriers to being active and participating in sport.
- 2.17. In Hillingdon, Sport England has recently signed off the Strategic Outcomes Planning Model report, Emma Bernstein, Capital Projects, Sport England commented, **“This report has gone into more detail that I expected from our initial brief so I am pleased with the content and I am happy to sign off from a Sport England perspective.”**
- 2.18. On the following pages are three case studies, the first two are recent SOPM reports recently completed and the final case study is a management options appraisal example.

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Figure 4 – Case Studies



Strategic Outcomes Planning Model

Overview

In 2018 Chiltern District Council commissioned Max Associates to develop a Strategic Outcomes Planning Model (SOPM) for the district.

Summary of Project

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.

In order to understand the current and future facility and service requirements for Chiltern in relation to sport and physical activity, Max Associates undertook a full review to ensure any future investment into facilities and services will directly impact the delivery of the Council local strategic outcomes and priorities.

Whilst the planning document was for 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.

The planning model included; 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.

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.



w: www.max-associates.com
e: lisa@max-associates.com
t: 07724 001773

Outcome

The report has been successfully submitted and signed off by the Council and Sport England and a successful expression of interest submitted in the summer of 2019. A £1.5m capital fund application is being taken to Sport England's investment committee for approval in September 2019. Since working on the SOPM, Max Associates 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.

In 2018 Max Associates was commissioned to deliver a Strategic Outcomes Planning Model 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. We found the work produced by Max Associates to be of excellent quality and they approached the project with great enthusiasm, imagination and in a very professional manner, with good communication throughout the project. Consequently, the final SOPM report has resulted in a successful EOI submission to Sport England, and a £1.5m capital fund application is being taken to Sport England's investment committee for approval.

Paul Nanji – Leisure & Community Manager, Chiltern District Council



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