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**Introduction**

Welcome to your guide to writing an effective operational plan.

The operational plan is the document that shows how your vision for your area is translated into outcomes on the ground.

It is the business case for your Our Place project. The aim of your operational plan is to show how services will be transformed in order to improve circumstances for people in your area in a cost effective way.

*We want your Our Place project to be a success. A good operational plan is key to communicating and implementing your service transformation. We hope this guide, based on our experience of reviewing 100+ operational plans, helps make producing an operational plan straightforward for you.*

**This guide is part of a package of support that includes:**

- Your relationship manager will advise on your operational plan
- You will also have the opportunity to take part in relevant training.
A note on process

- You will submit your draft plan in late October, using the link we send you
- A small team of people will read all the Our Place area plans and give you feedback
- You will incorporate feedback
- All areas will be invited to take part on peer review events in November
- You will submit your final draft in February.
Navigating this guide

- **Part 1** is an overview of seven essential elements of an operational plan.
- **Part 2** focuses on how to develop and structure your operational plan, and to appeal to different audiences. Your operational plan is a public document and can be a dynamic source of material for pitching your vision, for affecting policy, and for drawing in funding and support.
- **Part 3** goes into more detail on what you need to include in your plan, presented in grid format.
- **Appendix A** give examples of how real operational plans have addressed the essential elements, and includes feedback from reviewers, so you can see what to avoid and what to aim for.
- **Appendix B** signposts to Our Place resources, and sources of information such as statistics to inform your proposals.
Part one: Seven essential elements

1. **Vision and Context**
   A clear vision for the future.

2. **Effective service transformation informed by your community**
   - A convincing case for change in your area
   - Clear proposals for service transformation
   - How the service transformation will bring the desired improvements
   - How benefits will outweigh costs
   - All anchored in community need and informed by community engagement.

3. **Budget**
   - Plans for pooling, devolving or aligning budgets
   - How these budgets will be sourced
   - How the budgets will be used to achieve your vision and deliver your proposals.

4. **Resources**
   - Consideration of all the resources needed - e.g. human, financial, investment, capital requirements
   - How these resources will be sourced.

The final operational plan should emphasise the three ‘i’s’:  
- Community *involvement*  
- Leading to *innovative* solutions  
- With resources found to *invest* in them.
5. Partnership, leadership and governance
   - Partners you have in place
   - Why these are the right partners
   - Demonstration of partners commitment and support, now and going forward
   - Viable and sustainable governance and leadership arrangements.

6. Implementation plan
   A realistic and achievable plan that is ready to go from April and supported by a good strategy/approach for sustaining the service transformation.

7. An easy to navigate, brief, well-structured, public document
   Readers will include:
   - your community
   - partnership
   - funders and investors
   - Locality
   - The Department for Communities and Local Government
   - Our Place areas
   - Champions.

Purpose of your Operational Plan

- Builds a robust business case for your Our Place project
- Sets out your vision and proposals, and how you will achieve them
- Shows work to date
- Secures buy-in from partners
- Provides feedback to your wider community – and tells them what will happen next.
Part two: Developing and structuring your operational plan

Your partnership will need to have a discussion about the plan. Here are some questions to ask:

- What structure will it take?
- Will one person do most of the writing?
- Who will do the fact finding? You will need robust information to illustrate need - see appendix for a list of sources
- How will partners feed in and then review the plan?
- How does this fit with partner’s sign-off processes and the timing of partners meetings?
- What about design? Will you engage a designer? What is their timetable?

Do not leave it to the last minute. It may help to keep the seven essential elements in mind at meetings and events and arrange notes under these categories. Photos of your community are great too, so take pictures along the way and get permission to put them in the final document.

Considering your audience / reader

The plan needs to work for a wide audience. For example the plan is a way of feeding back to your community and partnership, and may also be read by potential partners and government officers. Using summaries, diagrams, pictures and quotes is great for making information accessible to all, so people really get your Our Place idea and want to stay engaged. Think about representing the community and partnership in the plan, for example through pictures and lists of partners.
Your operational plan audience

Audiences outside your area

- **Locality** - who will review your plan, share learning, and champion good Our Place approaches
- The **Department for Communities and Local Government** - who formally agree that your operational plan is fit for purpose. The department are also interested in identifying innovative approaches that can inform policy. When reviewing your plan Locality and The Department for Communities and Local Government will be checking that your plan includes the seven essential elements
- **Other areas wishing to apply the Our Place approach** to service transformation.

Audiences within your area

- **Partners** - those who you have engaged and worked with to develop your proposals
  For example local people, statutory services, voluntary and community services, and businesses
- **Potential partners**, considering getting involved in implementing and championing your Our Place project. This including potential investors such as

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**Champions**

Our Place Champions can help you finalise your draft and promote your operational plan. They can help you identify what aspects are most relevant to your stakeholders and show how your plan can help meet aims and targets. Our Place Champions can help you communicate this message in a tailored way.
commissioners and funders. Communicate a robust case for why they should get involved.

All these audiences will:

- Appreciate a document which flows and is not too text heavy
- Be looking to see what opportunities the plan offers them and how they can get involved.

Making the connections in your operational plan

A good structure to your operational plan will help you communicate how it will deliver your vision. Your logic model is a starting point as it shows the relationships between the essential elements. Showing your reader how these elements relate will help you to communicate your case for change locally.

For example:
Your vision informs your service transformation proposal.

- Your service transformation is your headlines news. Put these elements in early and make them obvious.

*Service transformation, vision and proposals* stem from your community engagement.

The process of developing your plan, and the published plan itself, are tools for ongoing engagement.

- The partnership can discuss the development of the plan at meetings.
- Different partners and the community can contribute to different elements. For example: young people can advise on design
The plan can encourage people to get involved in implementation and attract new partners, with some bringing budget with them. Build a sense of momentum and moving forwards together.

Be sure to describe what an operational plan is, giving background on Our Place and your Our Place journey.

The operational plan is a way of feeding back to and representing your community and partnership

- Represent those involved with a selection of photos and quotes
- Be positive about your community
- Make the plan readable, interesting and accessible to all, with further detail available for those that need it.

“What I love about Our Place is that window of opportunity to transform services”
- Our Place Area 2014-15
Community engagement can develop into co-design and governance and leadership.

- Demonstrate these progressions.

Those involved in governance and leadership, and those working in local business, and the statutory and voluntary sector may be local people. Elected members represent local people. Show these links and be inclusive.

Budget, resources and cost benefit analysis relate to your service transformation and community engagement. Show:

- How pooling, devolving and aligning budgets, and drawing in resources will help transform services
- Any community influence on this
- How the benefits of the service transformation outweigh the costs
- If you are required to complete a CBA, it is useful to describe the headline figures within the operational plan document itself.

Some Our Place areas are required to complete a formal cost benefit analysis (CBA) using the New Economy model. You will know if this applies to you but all operational plans should demonstrate how the benefits of services transformation will outweigh the costs incurred in making the plan happen.

The implementation plan shows how your budget and resources will result in your proposals becoming reality. Be specific.
An *aligned budget* is where public sector providers retain control and accountability for a budget in respective service areas but agree to spend it to deliver an agreed outcome/s.

A *pooled budget* is where service providers pool their budgets and collectively decide how to spend the money to deliver against agreed outcomes.

A *devolved budget* is where responsibility for spending decisions is devolved to the community (e.g. parish, social enterprise) from a service provider to deliver a particular service or outcome (a devolved budget could be aligned spend, one element of a budget, or a pooled budget)

Resources are financial investment, in kind physical items, time and expertise, and paid-for time.
Part three: What you need to include in your operational plan

The table below outline what needs to be included within the seven essential elements of your operational plan and some pitfalls to avoid.

How to quantify resources

- For any people paid by the project, use their wages and, if charged to the project, overheads, state the no of days worked each week whether overheads are included or not and the source of money to pay them
- For ‘in-kind’ input from people paid by other organisations, multiply the days they work on the project by their daily rate of pay, with or without overheads (but indicating which used) to arrive at an estimate of the financial value of their input. State the sources of the in-kind resources
- For volunteer or pro-bono support, multiply the days they work on the project by the local ‘going rate’ for their type of work, with or without overheads (but indicating which used) to arrive at an estimate of the financial value of their input. State the sources of the volunteer and pro-bono support
- For overheads, check with a similar organisation in the area and state what’s covered eg ‘full cost recovery’ (all the organisation’s costs) or employment related costs only
- For capital (one off) costs, get quotes.
Seven essential elements in detail

Include all of these elements in your operational plan. They don’t necessarily have to be in this order, but generally a vision and service transformation should be included early in your plan.

<table>
<thead>
<tr>
<th>Content</th>
<th>Do</th>
<th>Don’t</th>
</tr>
</thead>
</table>
| 1. Vision context and background  | Highlight vision/aspiration for the area  
  - Briefly describe the area - physical and demographic characteristics, levels of deprivation, challenges faced by the area  
  - Provide a rationale into why the geographic area was chosen  
  - See appendix for sources of information  
  - Recognise the pre-existing assets and skills in the area. | Overlook baseline data  
  Focus only on what is lacking.                                    |
| 2. Service transformation         | Clear proposals  
  - Focus on changes to local service delivery as a result of co-design with the community (See below for community engagement, priorities and delivery of services)  
  - Evidence that the changes you are proposing are worthwhile - how the benefits will outweigh the costs  
  - Outline the new approach and the logic behind the changes proposed, for example:  
    - better outcomes  
    - better quality service | Fail to explain how the activity proposed would deliver the stated outcomes. |
- reducing costs
- avoiding duplication

- Include your logic model (here or in an appendix)
- Include a formal CBA if asked to complete one.
- Show how the benefits will outweigh the costs even if not undertaking a CBA
- Include any impacts already achieved through your Our Place approach
- Consider using a ‘business case’ sub-heading summarising why you want to transform local services, what impact this will have, and how you have come to this well-informed position.

<table>
<thead>
<tr>
<th>Community engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Show how you know that the service transformation is informed by community engagement and priorities</td>
</tr>
<tr>
<td>- Give an overview of how the community has shaped the plan for example service user/community representation on working groups or taking part in co-design</td>
</tr>
<tr>
<td>- And wider community engagement - leafleting, fun days, meetings, surveys and local insight from existing groups</td>
</tr>
<tr>
<td>- And plans for on-going community involvement</td>
</tr>
<tr>
<td>- Demonstrate a structured approach to community engagement, range of engagement methods: broad consultation, targeted co-design work, reaching hard to help groups</td>
</tr>
<tr>
<td>- Include evidence of feedback to the community on the results of engagement</td>
</tr>
<tr>
<td>- Use appendices for much of the detail.</td>
</tr>
</tbody>
</table>

- Rely on tokenistic or one off consultation activity with no explanation of how it influences the project.
<p>| Community priorities | | |
|----------------------|-----------------|
| • Demonstrate how priorities were identified and agreed, and confirmed with the community | | |
| • Outline challenges to overcome, including why any previous/existing interventions have not been effective | | |
| • Provide a clear rationale for your choices. | | |
| | • Be unclear about why a particular priority has been chosen |
| | • Be unclear about whether this is a priority for the community or how you have identified &amp; confirmed that this is a priority. |
| Community delivery of services | Describe any services which the community will deliver and any which will be co-produced with the community. | |
| | Set out: | |
| | • the service delivery model | |
| | • how the service will be commissioned | |
| | • how the budget that has (ideally!) been secured to pay for it | |
| | • how the service will be governed and managed | |
| | • the role of the community in delivery/production | |
| | • the governance and management structures and processes. | |
| | • Be unclear on the service delivery model or the commissioning process. | |
| 3. Budget | Community-influenced spend - aligned budgets, devolved budgets, community commissioning | |
| | • Quantify the value of and describe any budgets that have been aligned, pooled or devolved | |
| | • Set out what influence the community has over these budgets e.g. participatory budgeting, direct control | |
| | • Include details of any spend mapping | |
| | • Set out the value of the budgets within scope and any changes proposed to the way budgets are handled | |
| | • Make no attempt to quantify the public spending that is within the scope of the proposal | |
| | • Ignore the role of the community in budget setting/spend. | |</p>
<table>
<thead>
<tr>
<th>4. Resources</th>
<th>Describe how the project is leveraging in resources to enhance the delivery of the service - for example:</th>
</tr>
</thead>
</table>
| **Other resources levered in such as - voluntary action, community-held assets, social finance, support from business** | - proposed numbers of volunteers and time committed  
- local businesses offering apprenticeships or work experience  
- use of venues, meeting rooms, etc.  
- trustees and board directors  
- other funding.  
- Where possible, clearly identify the monetary value. |
| **Be vague.** | |

| 5. Partnership, Leadership and Governance | **Partnership**  
- List your partners and show why they are the right partners  
- Show wider relationships outside of the formal partnership  
- Be clear which is which  
- You may want to namecheck partners early on, and then elaborate on partnership and governance later.  
<p>| <strong>Governance</strong> | Demonstrate accountability to residents and accountable officers in public bodies investing in the new/changed services |
| <strong>Fail to show how those making decisions over services/funding can be held to account for their actions by the public and/or accountable bodies with the statutory responsibility for delivering the service</strong> | <strong>Forget to thank those involved.</strong> |</p>
<table>
<thead>
<tr>
<th>6. Implementation Plan</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Be transparent about your financial practices</td>
<td>• Fail to demonstrate how the proposals identified in the plan will be taken forward</td>
</tr>
<tr>
<td>• Outline whether a new body oversees the project or reports through existing structures (council groups, area partnerships, working groups etc.)</td>
<td>• Lack a clear timetable</td>
</tr>
<tr>
<td>• Outline any hierarchy of governance. What are the opportunities for local people to continue to influence the process?</td>
<td>• Fail to set out how the listed activities will be funded and by which budget</td>
</tr>
<tr>
<td>• Demonstrate how the project is accountable to the community</td>
<td>• Fail to show how activities (inputs), outputs and outcomes will be measured and reported.</td>
</tr>
<tr>
<td>• Demonstrate how elected members are involved.</td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set out which organisation is responsible for managing implementation, including dedicated officer/staff resource</td>
<td></td>
</tr>
<tr>
<td>• Set out key activities and who is responsible for delivering them and when</td>
<td></td>
</tr>
<tr>
<td>• Include an implementation timetable setting out clear delivery milestones</td>
<td></td>
</tr>
<tr>
<td>• Show how progress will be reported/monitored.</td>
<td></td>
</tr>
<tr>
<td>• Show the funding and other resources and attribute this to the work streams.</td>
<td></td>
</tr>
<tr>
<td>• Include details for monitoring outputs and outcomes. What will be monitored and how? i.e. how will you know that what you are doing is producing the desired result</td>
<td></td>
</tr>
<tr>
<td>• Use a table to show this if you can.</td>
<td></td>
</tr>
</tbody>
</table>
**A note on cost benefit analysis**

If completing a CBA use the New Economy model. Show:

- the cost of the current service and the organisations that the costs fall to
- a clear explanation of the intervention/change to service that you are proposing and the cost of doing this
- a comparison of the two to show how the redesigned service produces greater net benefits than what was in place already
- the assumptions you are working on i.e. the circumstances required to make the project stack up in the way you have described e.g. recipients of service remains steady over next two years
- the timescales over which you expect to see the benefits
- Don’t worry if you are asked to do a cost benefit analysis - you will receive lots of professional support.

<table>
<thead>
<tr>
<th>7. An easy to navigate, brief, well-structured, public document</th>
<th>Tips &amp; hints:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Develop your plan with partners</strong></td>
</tr>
<tr>
<td></td>
<td>- Build up your plan by collecting organised notes, factual information, permissions, and images all in good time</td>
</tr>
<tr>
<td></td>
<td>- Set aside a day or two for your relationship manager to develop and review your plan</td>
</tr>
<tr>
<td></td>
<td>- Be clear about sign off processes and timetable</td>
</tr>
<tr>
<td></td>
<td>- Plan how partners will publicise your proposals / service transformation</td>
</tr>
<tr>
<td></td>
<td><strong>Decide on a shared style</strong></td>
</tr>
<tr>
<td></td>
<td>- Use the same margins, font, approach to numbering</td>
</tr>
<tr>
<td></td>
<td>- Use plain english</td>
</tr>
<tr>
<td></td>
<td>- Avoid acronyms</td>
</tr>
<tr>
<td></td>
<td>- Use bullet points (not more than 7 in a row), boxes (make sure your text fits in), diagrams and tables</td>
</tr>
<tr>
<td></td>
<td><strong>Make your document appealing to your audiences.</strong></td>
</tr>
<tr>
<td></td>
<td>It is a way of feeding back to those involved and is a promotional tool.</td>
</tr>
<tr>
<td></td>
<td>- Consider sourcing a local amateur or professional designer to help.</td>
</tr>
<tr>
<td></td>
<td>(Especially if this will bring community benefit too)</td>
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</tbody>
</table>
Write for busy people

- Be succinct. The document should be around 30 pages. Everything you include should be relevant and feed into the business case and implementation
- Include a summary at the beginning - short summaries throughout are also useful
- Use clear headings + subheadings
- Think headlines! What will your project achieve? Put this in early
- Include important information in the body of your text
- Use appendices for recording activity
- Consider using numbered paragraphs

Use a positive style to show how people are an asset

- Be positive about what local people can achieve rather than focussing only on issues people face
- Use the active tense. Write ‘We aim’ rather than ‘We were aiming’ and ‘We plan’ rather than ‘We had been planning’

Tell a story

- Explain what the Our Place approach is
- Include brief explanations - for example what commissioning means
- Build a sense of momentum. Link to webpages, video and other things happening in your project
- Include case studies
- Give a sense of before and after - to show how things will be transformed
- Include photos - of local people and places

Remember the operational plan is a public document. It needs to be accessible, readable and should not contain confidential information.
What gets missed?

The operational plan is usually a text heavy document, and this guide is too. So here is a visual guide to what gets missed from operational plans, done by the excellent Andy Perkin.
Appendix A: Examples of good operational plan practice

This appendix gives examples of good practice in real operational plans. Also included are tips, and a selection of real reviews of draft plans - some negative some positive. **We want you to succeed** and receive feedback like this:

“This is a particularly well presented plan - succinct, clear, nice use of graphics and diagrams, very little extraneous information."

“The panel really like the way you have told your story in the document and made your plans and (great) achievements to date understandable to both interested partners and their community.”

“Ambitious, incredibly interesting and innovative.”

“A very impressive piece of work. It will be really interesting to see how this model progresses and the differences that it should and could make to the local area. The plan works so well because it started from a very strong foundation of previous work and relationships, which have now gained an extra impetus to work differently from the Our Place initiative ... Additionally the theme they are working on is distinctive and costs and benefits are relatively easily identifiable, which is also helpful to the plan.”
1. Vision

*How the group set out a clear vision*

**Kimberworth**
Our vision is to make social isolation and loneliness amongst older people a thing of the past in Kimberworth Park. In practice, this means that we want to reduce isolation and loneliness to such extent that it is no longer an issue of pressing social concern for the community.

**East Devon (Cranbook)**
To create a vibrant local economy led by local people through the development of the Cranbrook business ladder.

**Inspired Neighbourhoods**
For residents to be socially and economically active while having the right tools to deal with barriers to employment, including health. The vision will be achieved primarily through:

- Sharing service delivery and aligning budgets for innovative partnership
- Coordinated and focused approach to deliver intensive employment and enterprise start up support
- Targeted delivery of skills, training and education to improve skills levels
- Supporting residents with physical, sensory and mental health challenges
- Transfer of public asset to local management, to enable coordinated service delivery
• Supporting employers (Public, Private and Voluntary sector) to provide opportunities for unemployed for employment, apprenticeships, work tasters and placement.

**Harlesden - Lift People** start with a brief project summary and then go directly to the vision.

• Put your vision and proposals in a prominent place in your document.
• Use a heading.
2. Effective service transformation informed by your community

*How the community are engaged in developing proposals and how the transformation being proposed will bring desired improvements.*

ROYDS, Caistor and Deneside demonstrate eye-catching ways they have engaged the community:
Centre at Threeways present their work in a logical and clear way:

**What are the ‘priority impact areas’?**

Q: How do we know what our community really wants and needs in order to tackle health inequalities and challenge some of the long-standing issues within their neighbourhoods?

A: We have asked them!

**What did people tell us?**

<table>
<thead>
<tr>
<th>Priority 1</th>
<th>Priority 2</th>
<th>Priority 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wellness &amp; Community-based Needs</td>
<td>Employment &amp; Opportunity</td>
<td>Improving Health &amp; Well-being in Local Area</td>
</tr>
</tbody>
</table>

**Our Response to our Community**

From the community engagement we have undertaken, our community told us that they see ‘wellsess’ and ‘community cohesion’ as being the main priority area where THEY want to see action being taken. So, what do we plan to do to meet these needs, and how does this shape our plans?

- Clearly, it is a big task to tackle the issue of ‘wellness’ within a community. We consider our role as being to listen to exactly what that means to our community, and focus on those issues which they identify as being priority in impacting their quality of life.

- From our engagement activities, it is clear that creating and building a sense of ‘community’ is priority to people in this area. There is a sense that people want too ‘Look after each other and enjoy life’ and ‘To meet other groups and people’ in order to feel a sense of cohesion and...

**Soho Victoria Friends and Neighbours** state that:

“There has been considerable community involvement in the development and shaping of the Our Place Approach. The consultation has been a mixture of community engagement and co-design of future services."

They summarise this activity, and show priority issues in a chart.
East Devon - Cranbrook show how initial engagement led to co-design. They outline their approach of: leaflets to all communities, family fun days and social media. This process made them notice the lack of spaces for the community to meet in this brand new town. They developed solutions to this - such as a community market - co-designing new town spaces with the community. These spaces will support local businesses. They state: “...the views of residents have constantly shaped the development of Cranbrook Business Ladder.....The exciting opportunity this now raises is a community based enterprise that can grow, develop and manage the Business Ladder components.”

In a similar way, the act of engagement became a central component of ROYDS service transformation.

ROYDS acted to translate jargon and to listen carefully. They were trusted and they state this in their operational plan. They built on this - with ongoing engagement, linking this to savings: “The idea of local people who are known and trusted becoming peer champions within communities and getting health messages out in order to engage at the heart of the community with people who would normally avoid contact with officialdom, e.g. Health, DWP, and Police etc. The ‘trust element’ is the most powerful factor of the programme, as health
buddies bridge the fear gap and help the community into the most appropriate health system. This approach can help to detect otherwise unknown health issues which can save the NHS significant amounts of money.”

Our Witham were praised for “Strong evidence of community engagement. Really like the co-design model”.

Durham County Council showed “Really strong community engagement from a standing start. Evidence already available that project has had an impact.”

Stewkley had good take up of their scheme: providing part time employment by taking over municipal ground contracts. The reviewer found the fact the scheme has been ‘sold’ to several villages as good evidence of community support and engagement.

This section of your plan can build momentum, show the transformative powers of the Our Place approach and really keep people engaged.

Quotes, pictures and a customer journey showing how an individual navigates services can be a nice addition here, and can lead neatly to the business case.

For more on community engagement see the resources at http://mycommunity.org.uk/programme/our-place/
How areas have set out a clear case for change

Substantiate your business case (see the appendix for a list of places to go for source materials). Link this to your community engagement feedback and information from partners. Show how things were when you started, and how the Our Place approach will help.

Kimberworth were praised for using a relevant quote to make a very clear case for tackling social isolation.

“Individuals who are socially isolated are between two and five times more likely than those who have strong social ties to die prematurely. Social networks have a larger impact on the risk of mortality than on the risk of developing disease, that is, it is not so much that social networks stop you from getting ill, but that they help you to recover when you do get ill.” Marmot (2010) Fair Society Healthy Lives Final Report

Drawing a connection between local and national information is helpful.

Soho Victoria Friends and Neighbours business case opens with official data illustrating need, followed by local survey statistics illustrating the motivation for change:
**Soho Victoria Friends and Neighbours** then outline their hub model and show how it will meet needs and priorities. They build the rationale for their work through points focussed on:

- Current demands on health services
- Disadvantages of top down delivery service
- Local people as recipients of services being ‘done to’ and seen as problems
- An alternative asset based approach
- Ending a culture of dependence and, instead, empowering individuals to identify what they need to improve their quality of life
- Creating multiple places where this interaction can happen
- Leading to an increase in both volunteers and referrals so that local needs are met and local people are fully engaged in the solutions to those local needs.

They specify outputs such as ‘150 people actively engaged in supporting vulnerable people within their own community’ and they end the business case section with a grid of outcomes.

**East Devon - Cranbrook** build a business case by considering how regional trends relate to this new town, using subheadings ‘What does this mean for Cranbrook?’ They then suggest potential for business start-ups using a grid.

**Stewkley** are especially clear asking ‘What Business Case Supports this Operational Plan?’ and answering:

“The following rationale underpins this operational plan:

1. If the local authority continues manage the maintenance activities then local quality standards will reduce because of central budget constraints and will hence negatively impact on the living environment
2. If the maintenance work continues to be centrally managed then local people (especially young people - 16-19) won’t have access to local paid part-time work. This Our Place operational plan enables the establishment of a local devolved enterprise solution that creates local part-time employment opportunities at no additional cost to the state.

3. Older retired people are seeking to keep active and contribute to their communities. Many are highly skilled, experienced and can pass on their knowledge and expertise to young people through a local enterprise solution. SEA can make that happen.”

The rationale is followed by intended outcomes and a table of costs and benefits.

Cost Benefit Analysis
Because cost benefit analysis is number based it is vital to translate it for people who may be unfamiliar with the technique. Take time to walk people through the calculations. You can use your cost benefit ratios in presentations and grant applications.
Our Witham contains a useful summary of the CBA: “it is estimated that for every £1 invested in this programme £1.72 will be returned to a variety of public sector agencies through by reducing the requirements on reactive support services. It is also estimated that for every £1 invested, this programme has the potential to generate £37.70 Public Value Return on Investment.”

Harlesden Lift people summarise their CBA by including a pie chart.
East Devon - Cranbrook describe their CBA in an accessible way, and are realistic about the ‘Costs and Assumptions of business ladder components.’ The reviewer said “The resources are carefully and comprehensively considered from the Cost Benefit Analysis section.”

For more on CBA see the Cost Benefit Analysis kit at [http://mycommunity.org.uk/resources/cost-benefit analysis-kit/](http://mycommunity.org.uk/resources/cost-benefit analysis-kit/)
3. Budgets

Plans for pooling, devolving or aligning budgets, how this will be done, and how the budgets will be used to achieve the vision

Stewkley were successful in pooling budgets and were highly praised: “…brilliant that agreement already in place from parishes for devolved budget”
“…impressive that commitment has been secured from six parishes because a compelling case was made around part time work.”

In Great Yarmouth “A pooled budget has been identified with Gt Yarmouth Borough Council and Voluntary Norfolk to ensure support for the Local Action Group.”

Inspired Neighbourhoods provide a simple statement explaining how budgets will be used to achieve their vision: “The Employment Link Programme brings partners and local communities’ together to co-design, co-produce and co-deliver employment and enterprise support services for those who are most vulnerable and farthest from employment for economic, health, disability, social, cultural or family related challenges. It further enables partners to pool its resources, achieve cost efficiencies and realise sustainable outcomes, through targeted delivery of services.”

A common criticism of operational plans is: “There is no indication within the plan as to whether existing budgets might be pooled, devolved or aligned as a part of this approach.”
Pooling and devolving of budgets can take time and may not be in place by the time you complete the operational plan. Often the value of the service transformation needs to be demonstrated in order for public agencies to see the financial benefit of contributing funds to it.

Kimberworth shows the local requirement for persuasive evidence:

5.15 What none of the Public Sector officers involved could do was identify any way of influencing public sector spend towards the community. Nor did they see opportunities for aligning/devolving budgets or commissioning. Officers were committed to the approach but the severity of public sector cuts, alongside existing mind-sets within the public sector, meant they were constrained and restricted to offer more.

5.16. What they were prepared to do was: (a) identify where there might be budget underspends, (b) offer information where possible on existing public sector contracts (e.g. Social Prescribing) and (c) provide information to support the ongoing process.

5.17 They felt compelled to add that in order to influence community spend, align/devolve budgets in the future they would need outcome evidence (including financial). This would offer a rationale for informing and influencing mind-sets and the way budgets/ contracts are focused.

There are other ways of aligning services. For example, local services share a radio channel in One Ilfracombe which helps the right service respond to issues and prevents duplication.
4. Resources

How the operational plans consider all the resources needed - human, financial, investment, capital requirements and how these will be met

Describe and quantify resources that enable services to be delivered, and identify elements by the community and co-produced elements, such as volunteers or use of community buildings. See appendix for how to quantify in-kind resources.

Be clear about your sources of funding and support. State what sources of funding will pay for which activity. For example this overview of resourcing is in Scarborough’s implementation plan

Show your track record. Soho Victoria Friends and Neighbours illustrate their resourcing capabilities with points like this “Friends and Neighbours have already secured £9,970 from CENTRO to develop the bikes.”

This section is the place for a risk assessment. For example, if the operational plan identifies a number of potential sources of grant funding, show that you have assessed the risk of not being granted the funds.
ROYDS demonstrate that they have carefully considered how to support the project with a plan reliant on securing large amounts of funding, and an alternative plan should initial funding not be secured.

5. Partnership, Leadership and Governance

How the area shows it has the right partners, commitment and support in place now and going forward. How the area shows that governance and leadership arrangements are viable and sustainable.

Inspired Neighbourhoods impressed the reviewer with: “Clear leadership and governance arrangements, and strong commitment from partners, who have all committed to the operational plan.”

Soho Victoria Friends and Neighbours build our confidence in their partnerships and relationships by mentioning them throughout the plan, and linking to local policies and strategies. For example “Friends and Neighbours have close working links with Learning Works a Health Authority training initiative.”

Cheltenham list their partners:

- Cheltenham Borough Council (Lead Organisation and co-manager)
- Cheltenham West End Partnership (Co-Manager)
- Cheltenham West End Partnership (CWEP) is a not for profit community regeneration Gloucestershire County Council.
• Gloucestershire Police
• Cheltenham Borough Homes
• Gardners Lane and Oakwood Federation
• People and Places
• County Community Projects.

Cheltenham also give information about each partner’s mission, policies and commitment.

**Inspired Neighbourhoods** clearly list partners’ commitments to delivery in their implementation plan:

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Courses</td>
<td>Shipley College / Bradford College (courses)</td>
<td>Establish Courses for pre-ESOL, Basic IT and Literacy and Numeracy. Complete recruitment drive and registration.</td>
<td>First cohort of courses completed in July. Evaluation completed. Recruitment for Second Cohort of courses completed end August 2015 and courses start in September 2015.</td>
<td>Second cohort of courses complete in December 2014. Evaluation completed. Recruitment for Third Cohort of courses completed in December 2015 and courses start in Jan 2016.</td>
<td>Third Cohort of courses start in Jan 2016 and complete in March 2016. Evaluation completed.</td>
<td>150 residents into employment, training, or volunteering</td>
</tr>
<tr>
<td>Volunteering</td>
<td>INCIC and Bradford Moor Community Centre (lead)</td>
<td>Recruit 16 volunteers and complete DBS checks (April 2015) and complete training (May 2015) — to help with Job Club, Resident engagement, programme delivery and governance. Action plan completed with volunteers personal goals and ambitions.</td>
<td>Support volunteers in their roles and personal goals Complete Evaluation in September 2015.</td>
<td>Recruit 15 volunteers and complete DBS checks (Oct 2015) and complete training (Nov 2015). Action plan completed with volunteers personal goals and ambitions</td>
<td>Support Volunteers in their roles and personal goals Complete Evaluation in Feb/March 2016.</td>
<td>35 volunteers engaged</td>
</tr>
</tbody>
</table>
Stewkley ask:
- ‘What is the Governance model?’
- outline ‘Project Deployment Governance’
- recommend and detail a management governance model in a visual way
- add a diagram outlining the operational (contractual) relationship.

<table>
<thead>
<tr>
<th>Deployment Project Board</th>
<th>Oversees the project plan and deployment of the cluster model to comprise one representative from each Parish Council.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEA Coordinator</td>
<td>Manages the day-to-day deployment and establishment of the cluster service. Will continue to manage the service ongoing.</td>
</tr>
<tr>
<td>Local Coordinators</td>
<td>Located in each Cluster area to help with local logistics and any issues that may arise; they may or may not be local Councillors.</td>
</tr>
<tr>
<td>Workers / Operatives</td>
<td>Physically carry out the service; however, during the deployment phase will be required to help “bed in” the service and to help refine and strengthen the training programmes.</td>
</tr>
</tbody>
</table>
### Kimberworth Park Community Partnership list their governance arrangements as follows:

<table>
<thead>
<tr>
<th>7</th>
<th>Governance</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1</td>
<td>The KPCP Board of Directors has overall responsibility for Our Place Governance.</td>
</tr>
<tr>
<td>7.2</td>
<td>An Our Place Steering Group has been developed, the composition of which includes:</td>
</tr>
<tr>
<td></td>
<td>- Representatives of community groups with an interest in work with the vulnerable elderly</td>
</tr>
<tr>
<td></td>
<td>- Individual community members who expressed an interest in the development of the work</td>
</tr>
<tr>
<td></td>
<td>- Public Sector agencies offering support to the process</td>
</tr>
<tr>
<td>7.3</td>
<td>The key functions of the Our Place Steering Group are:</td>
</tr>
<tr>
<td></td>
<td>- The development of the Operational/Implementation plans</td>
</tr>
<tr>
<td></td>
<td>- Ensure clear communication between the Our Place Partnership Group and KPCP’s Executive through regular updates and reports</td>
</tr>
<tr>
<td></td>
<td>- Develop a communication framework for ensuring accountability to local people</td>
</tr>
<tr>
<td>7.4</td>
<td>Communicating with the community.</td>
</tr>
<tr>
<td></td>
<td>As a result of exploration and debate through the development and operational planning processes, local community agencies have decided to develop a local Campaign Against Loneliness, with links to Rotherham’s Less Lonely Campaign and the National Campaign against Loneliness.</td>
</tr>
<tr>
<td>7.5</td>
<td>The underpinning principle in this sees isolation and loneliness as community responsibilities. In this local agencies have agreed to:</td>
</tr>
<tr>
<td></td>
<td>- Enable local people, individually/collectively, to explore taking personal/group action against loneliness/isolation</td>
</tr>
<tr>
<td></td>
<td>- Use social/local media to increase community awareness/understanding of isolation/loneliness</td>
</tr>
<tr>
<td></td>
<td>- Facilitate local people/agencies working together to build a more responsive and responsible community, which understands the impact of loneliness and takes action to eradicate it</td>
</tr>
<tr>
<td>7.6</td>
<td>Such an approach is seen to (a) enable accountability to the community in terms of the Our Place approach, and (b) ensure the sentiments of building community responsibility and enrichment are achieved.</td>
</tr>
<tr>
<td>7.7</td>
<td>Outcomes from such a process with help:</td>
</tr>
<tr>
<td></td>
<td>- Shape/deliver local services to be responsive to meeting individual need</td>
</tr>
<tr>
<td></td>
<td>- Maximize the potential of shared resources</td>
</tr>
<tr>
<td></td>
<td>- Enable the local agencies involved in the process to gain from the shared learning that derives from partnership working</td>
</tr>
<tr>
<td></td>
<td>- Support the development of the evidence base needed to inform and influence future public sector mind-set, community spend, aligned/developed budgets and commissioning.</td>
</tr>
</tbody>
</table>
6. Implementation Plans

A realistic and achievable implementation plan, supported by a good strategy/approach for sustaining the service transformation beyond March, credible and ready to go from April

**Soho Victoria Friends and Neighbours** implementation plan is in a grid and includes objectives, activities, outcomes, specific targets, realistic timescales and sources of funding. This is accompanied by a proposed expenditure and staffing structure over 5 years.

**Wye with Hinxhill** and **Harlesden Lift People** also have a useful grid format for showing their implementation plans.
7. An easy to navigate, brief, well-structured, public document

**Design**

*New Wortley* show that people feel relaxed at their community centre

*Phoenix Community Housing* make the community look fun to be part of
Feock and Newcastle have beautiful covers

Scarborough represent service users beautifully, and use photos to good effect.

Saffron Lane make key facts accessible
The design and layout of White Rock is appropriate to a project involved in offering workshop space to artists and designers.
Black Country Make and 198 Arts and Community are also well designed - appropriate for partnerships engaging young people in design.
Structure

Structure and length were issues for reviewers who had to search for the key points. The advice given in these feedback comments shows what pitfalls to avoid:

“The plan would benefit from a concise vision and key aims being stated early in the document - with an overall summary at the start.”

“The plan is reasonably comprehensive, but is also long and wordy. The use of summaries and bullet points to pull out key pieces of information would help. Some of the information provided is less relevant and too detailed - for example community engagement events. The plan needs a summary at the beginning before getting into the detail.”

“The challenge to the reader is in finding the specific details which describe what the plan is all about - even the executive summary doesn’t tell us what the plan will do.”

“Stylistically, it could usefully place the vision and a summary of the proposal at the front and then move into the background, context and rationale. These could be reduced in content as focus shifts to implementation.”

“This plan needs to ensure that all members of the local community/stakeholder team can understand it. Taking complex scenarios and communicating them concisely will be key to the success of this project. This public document can also be a marketing document and they should highlight all the impressive work that they are doing more!”
A handful of plans took an approach to structure that used analogies to help the reader navigate their operational plans. This is not essential but in these cases it works well to guide the reader through the document.

The White Rock Trust wants people to flow into Hastings town from the seaside. The reviewer observes: “By focusing on the golden thread of ‘Flow’ (consumer footfall) the team have found a powerful mechanism for articulating and exploring the issues within the area. This understanding is then built upon using the metaphor of the area functioning as a body which will help make the document understandable to a wide audience.”

Walton used an acronym of ‘spice’ and then ‘recipes’ to show their work, which the reviewer appreciated: “The SPICE approach provides focus and consistency through the plan and was produced based on community consultation.”

Spice stands for:

- **S** Skills promotion
- **P** Pride in a cleaner community
- **I** Intergenerational work to end isolation
- **C** Community Safety and crime reduction
- **E** Employment

(Each letter has a chapter, including a recipe of changes and activities resulting in the change /impact.)
Stewkley gives us headline news early on and Feock give a sense of momentum with their news clips:

If the SEA Cluster approach of creating local part-time work for local people was adopted across Buckinghamshire it could create up to 1,100 part-time local work opportunities. That is an economy working for its people.
Harlesden Lift People have great structure. Here is their contents page:

<table>
<thead>
<tr>
<th>PROJECT SUMMARY</th>
<th>4. Our service model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision</td>
<td>4.1 Role of the peer volunteers</td>
</tr>
<tr>
<td>Objectives</td>
<td>Advice, support and advocacy</td>
</tr>
<tr>
<td>Advice, support and advocacy</td>
<td>Connecting to Communities</td>
</tr>
<tr>
<td>Influencing system change:</td>
<td>Influencing System Change</td>
</tr>
<tr>
<td>Connecting communities:</td>
<td>4.2 Service operation</td>
</tr>
<tr>
<td>Description of project</td>
<td>4.3 Commissioning and budget</td>
</tr>
<tr>
<td>Key outcomes</td>
<td>5. Cost benefit analysis of the project</td>
</tr>
<tr>
<td>Community benefits</td>
<td>6. Governance and accountability</td>
</tr>
<tr>
<td>1. Context and background</td>
<td>6.1 Governance</td>
</tr>
<tr>
<td>2. Our strategic priorities</td>
<td>6.2 Accountability</td>
</tr>
<tr>
<td>3. Our Place, our project</td>
<td>7. Project management</td>
</tr>
<tr>
<td>3.1 Why this project is needed</td>
<td>7.1 Project implementation plan</td>
</tr>
<tr>
<td>3.2 Why we are targeting people with multiple needs</td>
<td>7.2 Risk summary</td>
</tr>
<tr>
<td>3.3 Gaps in current provision and how our project is different</td>
<td>7.3 Monitoring and evaluating the project</td>
</tr>
<tr>
<td>3.4 Why we have chosen a peer volunteering model</td>
<td>7.3.1 What are we measuring?</td>
</tr>
<tr>
<td>3.5 What we want to achieve</td>
<td>7.3.1 How will we measure the outcomes?</td>
</tr>
<tr>
<td>APPENDIX 1: Cost Benefit Analysis for Harlesden Working Together</td>
<td>APPENDIX 2: Statement of Intent for Partners</td>
</tr>
</tbody>
</table>

| 53 | P a g e  |
Appendix B: Further information sources

- My Community is the home of Our Place and contains stories and resources from the programme: mycommunity.org.uk
- The Just Act Forum is chat with people who are doing similar projects to you: justact.org.uk
- Locality delivers the Our Place and My Community programmes on behalf of DCLG: locality.org.uk
- Open Data communities: http://opendatacommunities.org/showcase/deprivation

Our Place partners

- Community Development Foundation: http://www.cdf.org.uk/
- National Association of Local Councils (NALC): http://www.nalc.gov.uk
- Local Government Association: local.gov.uk
- New Economy: neweconomymanchester.com/stories/1828-new_economy
- Pro Bono Economics: www.probonoeconomics.com/
- Voice for Change: www.voice4change-england.co.uk/
- Office for Public Management (OPM): http://www.opm.co.uk/

Your local centre for community actions (also called council for voluntary service)
Other useful links

- Office for National Statistics: www.ons.gov.uk
- Compact Voice - for guides on communicating with statutory sector audiences, such as police commissioners: http://www.compactvoice.org.uk/
- For advice on plain English: http://www.plainenglish.co.uk/
- For specialist information such as medical research or the impact of green spaces, consider relevant journals.
  For example:
  - http://aas.sagepub.com
  - www.palgrave-journals.com
  - www.ajpmonline.org/article/S0749-3797%2812%2900804-5/abstract

- All Operational Plans mentioned in this guide are available to view - just email ourplace@locality.org.uk
- All your necessary resources for producing operational plans are in the Our Place operational plan kit: http://mycommunity.org.uk/resources/operational-plan-kit/