

Place and Wellbeing Assessment: How To Guide



About this guide

This document provides guidance on how and when to use a [Place and Wellbeing Assessment](#). This will enable you to use the [Place and Wellbeing Outcomes](#) in a way that enhances consideration of place when making decisions and the importance of using relevant data to understand what is happening to people.

This guide is based on learning captured throughout the duration of the three-year [Shaping Places for Wellbeing Programme](#) and the development of the Shaping Places for Wellbeing place-based approach, of which Place and Wellbeing Assessments play a crucial role.

The guide assumes the reader has some understanding of the impact that place has on the wellbeing of people, planet and reducing inequalities and the contribution of the **Place and Wellbeing Outcomes** to improving place.

The guide outlines the context for determining whether to undertake a Place and Wellbeing Assessment, details the practical steps involved throughout the Assessment process and shares insight on the process gained from local project activity.

This guide aims to equip you with the knowledge and confidence to conduct your own Place and Wellbeing Assessment, supporting the reader to take a place-based approach in local decision-making processes.

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Part 1: Introduction

Shaping Places for Wellbeing Approach

Evidence shows that the places where we live, work and relax have an impact on our wellbeing, on the wellbeing of our planet and on how much inequality exists between the richest and poorest in society. Given this, it is crucial that we create places that contain all the features that evidence tells us will have a positive impact. A place-based approach, combining three key elements, can support the creation of these places:

- Knowing what **people** in an area are experiencing
- Understanding the evidenced features every **place** needs
- Considering the impact of the **decisions** we are making on both of these.

This approach was taken by the Shaping Places for Wellbeing Programme and refined through experience of working locally in seven Project Towns across Scotland between 2022 and 2024 supporting councils, health boards and other stakeholders to embed a place-based approach in their decisions and actions.

What is a Place and Wellbeing Assessment?

A Place and Wellbeing Assessment is a tool designed to guide decision-making around a specific plan, policy or proposal. Its **purpose is to inform decisions** by evaluating potential impacts on a place and its influence on the wellbeing of both people and the environment. Conducted early in the decision-making process, before implementation, the Assessment fosters collaboration and constructive dialogue aimed at identifying optimal impact, rather than serving as a critique.

The process includes four essential stages: preparation, the Assessment Session itself, write up of the Assessment Report, and follow-up afterwards. The Assessment Session stage may be repeated at different phases of a plan or proposal's development.

Central to the process is a facilitated session where stakeholders assess how a plan, policy, or proposal will impact key features of a place that promote health and wellbeing. These features are known as the **Place and Wellbeing Outcomes** and guide the evaluation. Background information and context to the Place and Wellbeing Outcomes can be found in the [briefing paper](#) and [introductory video](#).

The Assessment also considers the impact on different population groups, recognising that a community consists of multiple, distinct groups with unique needs, especially those experiencing inequalities.

Importantly, the Assessment offers an impartial view of both positive and negative impacts of the plan, policy or proposal highlighting any unintended consequences of its content. It is not intended to be used to justify decisions that have already been made or to evaluate existing plans or policies.

A Place and Wellbeing Assessment can be conducted for any plan, policy or proposal, ranging from high-level policies at regional level to more specific projects at the local scale. Each Assessment is tailored to the decision-making process it supports.



Part 2: Process for a Place and Wellbeing Assessment

This section outlines the four key stages involved in the Place and Wellbeing Assessment process:



1. Pre-Assessment Planning and Setup

Step 1: Decide whether to undertake a Place and Wellbeing Assessment

There may be instances where a clear trigger prompts the need for a Place and Wellbeing Assessment. In other situations, it is necessary to consider whether an Assessment is appropriate by asking the following questions:

- Does the plan or proposal impact place and the wellbeing of the affected community?
- Is there an opportunity to contribute a place perspective into the plan or proposal?
- Will the Assessment provide valuable insights to support decision making?
- Are the necessary resources available to carry out the Assessment?

In some cases, a Place and Wellbeing Assessment may be requested by a plan or policy writers, or decision-makers seeking to inform their decisions. In other situations, interested parties may initiate the Assessment.

Regardless of who initiates the Assessment, define the specific decision-making process or governance structure to which the Assessment's findings and recommendations will contribute. If no clear process is in place to receive and consider the results, re-evaluate whether the Assessment will be of value.

Once a decision is made to proceed, appoint an Assessment Lead. This individual will act as the primary point of contact and will be responsible for organising the Assessment and ensuring the process is followed from start to finish.

Step 2: Define the purpose and aims of the Place and Wellbeing Assessment

Clearly define the document or decision to be assessed. Additionally, specify the geographic area over which the impacts will be considered. The complexity and length of the document should guide lead in times to ensure participants have sufficient time to review the material prior to the Assessment Session.

Clearly define which stage of the plan, policy, or proposal is being assessed. Whilst this adds value at all stages of strategy development, you should conduct the Assessment as early in the decision-making process as possible.

It is important to have clarity on the decision makers and process that a Place and Wellbeing Assessment will feed in to, as per Step 1 above.

Step 3: Identify stakeholders for the assessment session

Identify key experts who can provide valuable insights and fresh perspectives to the decision-making process and will understand the intended objectives, such as:

- Document or plan writer
- Steering group members
- Relevant decision makers.

If taking a collaborative approach, include participants with expertise from other service areas and sectors, and those representing the lived experience of different population groups.

Maintain a balanced range of perspectives while limiting the number of participants for meaningful discussion (max. 16 recommended).

Appoint a Chair to lead the session. This can be the Assessment Lead, an experienced facilitator, or someone who is independent from the plan or proposal being assessed.

Appoint an accurate note taker and ensure arrangements are in place to record the session. Doing so opens up the opportunity to use transcripts and AI to assist in capturing the conversation and recommendations.

Step 4: Prepare participants with key information

To ensure participants are adequately prepared for the session, provide them with a comprehensive briefing on the document or proposal being assessed. A simple 'Place and Wellbeing Assessment Briefing Note', accompanying the full document, should be developed to include the following:

- Purpose and aims of the Assessment
- The roles of participants
- Context about the policy, plan or strategy being assessed
- Context about inequality in the geographic area being considered (e.g. from the Scottish Index of Multiple Deprivation).

Inform participants of the time commitment involved in both preparing for and participating in the session. This ensures that they are fully aware of the level of engagement required for a thorough and meaningful assessment process.

See [Appendix 1](#) for example Briefing Note.

Step 5: Send out the Assessment Session invite

Invitations should be sent at least one month in advance to allow participants to secure time in their schedules. The invite should specify when additional documents will be shared and whether the Assessment Session will be held in person or online. If the session is to take place in person, provide the necessary information.

The appointed **Assessment Lead** should manage the meeting set up to maintain oversight of who will attend, ensuring the balance of expertise and perspectives as per Step 3.

Step 6: Issue documents prior to the session

At least one week before the session, send the following documents to participants, clearly stating that these materials must be reviewed in advance:

- **The Place and Wellbeing Assessment Briefing Note** (as per Step 4).
- **The policy, plan, or proposal being assessed:** Clarify the specific sections that need to be reviewed or if the entire document should be read.
- **The Place and Wellbeing Outcomes Checklist:** Advise participants to refer to this checklist when reviewing the policy, plan, or proposal. [Download the Checklist here.](#)
- **Agenda for the Assessment Session:** Provide an agenda detailing the structure and timing of the session. This will help participants understand the flow of the meeting and how their input will be organised.
- **List of Attendees:** Ensure compliance with General Data Protection Regulations (GDPR) by obtaining prior approval for sharing participants details.

Include a link to the [Place and Wellbeing Outcomes Briefing Paper](#), noting that this is optional reading but useful for those who wish to dive deeper into the subject matter.

Ensure the email is clear, concise and emphasises the importance of reading the documents prior to the session to ensure effective participation.

To assist those attending the session to contribute 3 steps are suggested:

Step 7: Send reminder

Send a polite reminder to participants a few days before the session. Reinforce the importance of reviewing the documents in advance, and confirm key details such as the date, time and any logistical arrangements.

2. The Assessment Session

The Assessment Session is the core stage of the process, where participants work to identify the impacts of the policy or proposal on place and wellbeing. Additionally, participants help shape recommendations aimed at enhancing the plan's positive effects on place and the wellbeing of the local community.

In some cases, simply identifying the key impacts and the populations most affected is sufficient to generate useful recommendations. In other instances, participants or the Assessment Lead may refer to evidence and research behind the Place and Wellbeing Outcomes to provide a broader perspective on how place influences wellbeing.

Step 1: Welcome and Introductions

The Chair should welcome participants and introduce the session by covering the following points:

- **Purpose:** Clearly state the purpose of the session.
- **Documentation overview:** Recap the documents shared in advance and explain how they will be used during the session.
- **Checklist focus:** Introduce the Place and Wellbeing Outcomes Checklist which will guide the discussion. Highlight that the session will focus on the impact of the plan or proposal on the population groups affected by inequalities.
- **Roles:** Inform participants about note-takers and clarify whether the session will be recorded, ensuring that all participants give consent.

The Chair should then invite each participant to introduce themselves by stating name, job title, organisation and role in relation to the plan, policy or proposal being assessed.

Step 2: Facilitating structured discussion

The purpose of the session is to generate insights that guide decision-making aimed at improving health and wellbeing while reducing inequalities. Participants will examine the potential impacts of the plan, policy, or proposal on each aspect outlined in the Place and Wellbeing Outcomes Checklist.

The Chair will use the Place and Wellbeing Outcomes Checklist to facilitate a structured discussion, ensuring all outcomes are addressed thoroughly.

1. Working Through the Checklist

For each of the 13 Place and Wellbeing Outcomes:

- **Explanation of Outcome:** The Chair should clearly read and explain the content of the Outcome, ensuring all participants understand its relevance and meaning before discussion begins.
- **Assess Impacts:** The Chair should invite participants to assess both the positive and negative impacts of the plan on the Outcome, prompting them with key questions such as:
 - How will this proposal impact the overall wellbeing of the community?
 - How will this proposal affect those who are most impacted by inequalities?
- **Identify Opportunities for Enhancement:** Encourage discussion on how the plan or proposal could be adjusted to better achieve the desired outcomes, particularly in enhancing wellbeing and addressing inequalities.

2. Developing and agreeing on recommendations

The Chair plays a crucial role in encouraging participants to transform feedback and comments into clear, actionable recommendations. This process may require prompting and facilitation to ensure feedback becomes practical and useful suggestions.

- **Collaborative Approach:** Not all recommendations suggested during the session will be included in the final report. The Chair and participants should work together to filter and refine recommendations to ensure they are:
 - Relevant to the objectives of the Assessment
 - Feasible within the given context and resources
 - Aligned with the priorities of reducing inequalities and improving place-based wellbeing. This process ensures that the final recommendations reflect the most impactful and actionable steps.
- **Recommendations:** Based on the discussion, participants should propose specific, actionable recommendations that address the identified impacts on the Place and Wellbeing Outcomes and the population groups affected by inequalities. These should be clearly directed to relevant decision-makers or stakeholders.
- **Evidence-Based:** All recommendations should be grounded in research and evidence. The Assessment Lead or Chair may need to provide context or reference existing evidence related to the specific outcomes discussed.
- **Broader Recommendations:** In some cases, recommendations may extend beyond the scope of the specific plan being assessed. For example, if the Assessment focuses on a high-level strategy, suggestions may address how the strategy should be implemented or highlight broader systemic issues that need to be addressed.

3. Ensuring the Flow of Discussion

- **Structured Progression:** The Chair should ensure the discussion moves smoothly through each item on the Checklist, maintaining a balance between identifying impacts and developing actionable recommendations.
- **Time Management:** It's important to manage time effectively to ensure all Outcomes are covered and there is adequate discussion on each point, especially when participants are focusing on those Outcomes that may be more challenging or complex.
- **Consensus Building:** Encourage participants to reach consensus on recommendations where possible, while respecting different perspectives and maintaining the integrity of the discussion. Where consensus cannot be reached, note differing views and ensure they are represented in the final report.

Step 3: Recording the discussion

- **Note-taking:** The note taker should document the key points of discussion and recommendations using the Place and Wellbeing Assessment Checklist.
- **Audio-recording:** If agreed by participants, an audio recording of the session can be made to help ensure accuracy in reporting. This also provides the opportunity to use transcripts and AI tools to assist in capturing the conversation and recommendations.
- **Summary and Verification:** The recorded information and notes will later be summarised for the Assessment Report. However, it is essential to ensure that this summary is sense-checked to verify accuracy and completeness.

Step 4: Next steps and close

The Chair should summarise the key points and recommendations and provide a timeline for when the final report will be shared with participants. The session should conclude with thanks to all participants for their contributions.

3. Writing and sharing the Assessment report

Report that accurately captures the discussion and recommendations from the session.

Step 1: Produce a report of the session

The Assessment Lead is responsible for drafting the Place and Wellbeing Assessment Report. The Report should be based on the session notes, any audio recordings and the Place and Wellbeing Outcomes Checklist. The initial draft should be completed within 3 to 4 days of the session to ensure accuracy while the details are still fresh.

Report structure

To ensure clarity and readability, follow these guidelines:

- **Summary of Findings:** Begin with a concise summary of the key findings and recommendations that emerged from the session.
- **Clarity and Precision:** Use short sentences and paragraphs. Avoid transcribing conversations verbatim; instead, summarise the key points raised during the discussion.
- **Consistent Template:** Follow a structured format that aligns with the reporting used in the Shaping Places for Wellbeing Programme to maintain consistency across reports.

Key Sections of the Report:

The purpose of the Place and Wellbeing Assessment is to provide decision-makers with insights to improve the document or plan's impact on both place and people. The recommendations should directly flow from the discussions held during the session.

For each Place and Wellbeing Outcome discussed, include the following:

- **Outcome Wording:** Provide the exact text of the Place and Wellbeing Outcome.
- **Summary of Discussion:** Offer a concise overview of the key points raised in relation to this outcome.
- **Relevant Research and Evidence:** List any research and evidence that supports the discussion of this Outcome.
- **Recommendations:** Provide specific, actionable recommendations that address the identified impacts on the Place and Wellbeing Outcome, ensuring they align with the session's discussion.

Recommendations

Each recommendation should be clear, specific, and actionable. They may involve changes to the plan or proposal, additions to strategies, or suggestions for improved implementation. Ensure that all recommendations are guided by robust research and evidence. See [Appendix 2](#) for Examples of Recommendation wording.

Evidence

Referencing “The Evidence Behind the Place and Wellbeing Outcomes” helps stakeholders understand the evidence-based background for the recommendations. All sources of evidence, including those discussed during the session, should be properly cited, with sources included as footnotes.

Additionally, refer to [Outcomes on a Page](#) as a resource. These one-page briefing documents summarise the evidence supporting each Place and Wellbeing Outcome and its impact.

Step 2: Review the report

Share the draft Report with the note taker to ensure clarity and accuracy. The Assessment Lead may also choose to share the draft with session participants for further accuracy checks. After receiving feedback, the Assessment Lead should make the necessary revisions and finalise the document.

Step 3: Share the report

Once finalised, the Report should be distributed to key stakeholders to ensure the recommendations are reviewed and acted upon. The Report should be shared with:

- **Session Participants:** Provide the final Report with all participants who attended the session, ensuring they remain informed about the outcomes and next steps.
- **Assessment Leads or Relevant Groups:** Ensure the Report is delivered to those who have authority to determine how the recommendations will be incorporated into the plan or proposal.
- **Decision-Makers:** Provide the Report to the group with the appropriate authority to consider and act on the recommendations, such as senior management, policy writers, or planning teams.

By sharing the Report with these key groups, you ensure the findings are put into practice and the recommendations are given due consideration.

Step 4: Gather Feedback and Reflect

Collect feedback from both participants and decision-makers on the effectiveness of the Assessment process and its early influence on the final policy or proposal. Use this feedback to refine future assessments and enhance the overall process.

The Assessment Lead should offer to meet with the policy writer and decision-makers to discuss the report's findings and recommendations in more detail and be available to clarify any points and provide further evidence or insights where needed.

Once the Assessment Report has been submitted to the relevant group or decision-making process, the Assessment itself is considered complete. However, as noted in Step 1 of the pre-assessment phase, it is essential to have clearly defined the specific decision-making process or steering group where the findings will be presented.

4: Moving Forward with Recommendations

The ultimate goal of the Place and Wellbeing Assessment is to ensure that its findings inform decision-making and lead to tangible improvements in both place and wellbeing. The following steps should be taken to help embed the recommendations in the decision-making process and to track their implementation. Ultimately, it is the proponent of the plan to determine what to do with the recommendations.

Step 1: Identify Ownership and Accountability

To ensure the effective implementation of recommendations, ownership must be clearly

defined for each action point. This should specify the team, department, or individual responsible for progressing the recommendation.

Step 2: Set Clear Expectations

Communicate that not all recommendations are expected to be implemented immediately. Instead, there should be a commitment to review and prioritise actions, focusing on those that are most viable and impactful. Some recommendations may be revisited over time, and it's acceptable to start by selecting a few key actions to move forward with, rather than attempting to implement everything at once.

Step 2: Embed Joint Working

Identify the support and partnerships necessary to embed collaborative working across sectors in the plan. For example, a plan to improve access to green spaces might involve partnerships between public health bodies, local councils, and community organisations. Regular cross-sector working groups could be established to review progress and ensure all relevant parties remain engaged in decision-making and implementation.

Step 3: Set Priorities and Timelines

Categorise the recommendations based on their feasibility and impact. This may include immediate, short-term, and long-term actions. Assign specific timelines to each recommendation to ensure progress can be tracked and accountability maintained.

Step 4: Consistent Presentation and Tracking of Recommendations

Develop a consistent format for presenting recommendations. This will ensure that all involved parties understand the required actions, responsible individuals, and deadlines. Implement a system, such as a tracking sheet or dashboard, to monitor the progress of each recommendation. This will ensure visibility for all stakeholders and allow for updates on the status of each action.

Step 5: Process for Tracking Recommendations' Impact

Develop a process for monitoring and reporting on the progress of the recommendations. Regular progress reports and check-ins will ensure that recommendations are not only implemented but also assessed for their impact.

Step 6: Regular Check-Ins with Plan Owner

Establish a timeline for regular check-ins with the plan or strategy owner to review the progress of recommendations. These reviews should occur at key stages—immediately after implementation, at mid-term, and after the completion of the plan. This ensures that recommendations are being actioned and adjustments can be made where necessary.



Part 3: Lessons from Local Project Town Action

The Shaping Places for Wellbeing Programme [worked closely with seven Project Towns](#) to embed place and wellbeing considerations into decision-making processes.

This section highlights key lessons learned from the Project Towns, providing practical insights and guidance to enhance the Place and Wellbeing Assessment process outlined in this guide. The aim is to support the effective application of the approach across a range of local contexts, encouraging adaptable integration of place-based considerations.

Pre-Assessment Planning

Lesson 1: Applying Place and Wellbeing Assessments Across Different Levels

The Shaping Places for Wellbeing Programme demonstrated that Place and Wellbeing Assessments can be effectively tailored to suit both high-level policies and local-scale projects. In our Project Towns, Assessments were applied to a range of decision-making processes, offering insights into how adaptable the tool is in practice.

- **High-level Policies:** For strategic or regional plans e.g. a Health and Social Care Partnership Strategy, Assessments provided guidance on the impact of Outcomes, helping shape future delivery plans to better reflect place-based needs. These Assessments played a crucial role in aligning broader policy objectives with local realities and wellbeing outcomes.
- **Local Projects:** At the local level e.g. a local community Neighbourhood Plan, Assessments offered practical recommendations to enhance the impact of specific projects on place and wellbeing. This included improving proposals, informing the location of services, and strengthening funding bids.

Examples of [completed Place and Wellbeing Assessments](#) from Project Towns, demonstrating this, can be accessed on our website.

Lesson 2: Integration with Other Impact Assessments

While Place and Wellbeing Assessments are not legally required, they added considerable value when applied alongside other mandatory assessments (e.g. equality, sustainability, human rights). In practice, the Project Towns demonstrated how Place and Wellbeing Assessments could address gaps, particularly in areas where other assessments may not fully address the influence of place on wellbeing.

Integrating Place and Wellbeing Assessments with existing assessments, including Health Impact Assessments, ensured a more holistic evaluation, particularly by focusing on the social determinants of health. This was especially useful in ensuring that the impact on place was thoroughly considered alongside legal requirements.

Moreover, Place and Wellbeing Assessments provided early-stage insights, supporting the scoping and decision-making process.

Lesson 3: Distinguishing between the Place and Wellbeing Assessment and the Place Standard Tool

Throughout our work in the Project Towns, we were regularly asked what the distinction was between the Place and Wellbeing Assessment and the Place Standard Tool. Both have valuable, but distinct purposes:

- **Place and Wellbeing Assessment:** This tool is used to evaluate the potential impact of a specific plan, policy, or proposal on place and wellbeing, guiding decision-makers in considering both people and the environment early in the decision-making process.
- **Place Standard Tool:** In contrast, the Place Standard Tool is designed to facilitate structured conversations between communities and stakeholders about the current state of a place, helping assess how well it meets the needs of those living and working there.

The Assessment Session

Lesson 4: Managing Time During Assessment Sessions

In our experience with the Project Towns, we found that time management during Assessment sessions is critical to ensure all Place and Wellbeing Outcomes are thoroughly covered. Typically, sessions last about 3 hours, but covering all thirteen Outcomes can require more time.

Key Insight: Sessions often begin with the first Outcome, ‘Active Travel,’ but may run out of time before fully addressing later outcomes, particularly those under the ‘Civic’ and ‘Stewardship’ themes’. To address this, consider splitting the Assessment into two sessions or starting with a different Outcome to ensure comprehensive coverage of all themes.

Practical Tip: Be mindful of time constraints and plan your sessions accordingly. If it's essential to cover all Outcomes thoroughly, you may need to either extend the session length or prioritise certain outcomes based on local priorities and goals.

Writing and Sharing the Report

Lesson 5: Reporting and Managing Resource Constraints

In the Project Towns, we found that a structured approach to producing the Place and Wellbeing Assessment Report ensured it was clear, comprehensive, and valuable for decision-makers. However, we recognise that limited capacity and resources could make it difficult to develop a comprehensive report without a dedicated person to lead the process.

Key Insight: When resources are constrained, compiling a list of actionable recommendations could prove to be an effective alternative. Although this approach lacks the full depth of analysis and supporting evidence as a full report, it still provides a useful starting point for decision-makers, especially when there is already agreement on the importance of integrating place and wellbeing considerations into the process.

Practical Tip: In situations with resource constraints, prioritise the most critical, evidence-based recommendations. This flexible approach allows for progress, even without a full assessment, and ensures that key insights can still inform decision-making.

Lesson 6: Structuring Recommendations and Defining Ownership

A critical lesson from the Project Towns was the importance of establishing a clear process from the outset for how recommendations are decided, written, and assigned. Without a defined structure, there is a risk that recommendations may not be actionable or lack accountability.

Key Insight: Setting out a process early on to determine how recommendations are formulated ensures clarity and consistency. Equally important is identifying ownership of each recommendation—clearly assigning responsibility to specific individuals, teams, or departments to ensure they are progressed effectively.

Practical Tip: Before starting the Assessment, agree on a method for how recommendations will be discussed, refined, and finalised. Assign ownership to each recommendation to ensure follow-through, and outline how progress will be tracked. This ensures that the assessment leads to tangible, actionable outcomes with clear accountability.

Lesson 7: Developing a Process for Capturing Key Themes Across Recommendations

A valuable takeaway from the Project Towns was the need to develop a structured process for capturing key themes across the recommendations made during the Place and Wellbeing Assessments. By identifying recurring themes, decision-makers can gain a clearer understanding of the most pressing issues affecting place and wellbeing, and this can help prioritise actions.

Key Insight: Categorising recommendations under themes like **data and evidence use, collaborative partnerships, community engagement, aligning plans and strategies, focusing on vulnerable groups and identifying co-benefits** proved to be highly effective. This approach highlighted recurring concerns and allowed decision-makers to adopt a more strategic approach when implementing changes.

Practical Tip: During the Assessment process, clearly highlight recommendations by theme. This not only makes the final report clearer and more actionable, but also supports the long-term monitoring of progress across different areas of place and wellbeing.

Moving Forward with Recommendations

Lesson 8: Prioritising and Implementing Recommendations

In the Project Towns, we learned that it is essential to set realistic expectations about the implementation of recommendations. While the Place and Wellbeing Assessment often generates a broad range of valuable recommendations, it is not always feasible to implement all of them immediately.

Key Insight: Establishing a process to review and prioritise recommendations ensures that the most impactful and viable actions are taken forward first. Not every recommendation needs to be embedded right away—it's important to focus on those that will deliver the greatest benefit and can be implemented within the available resources.

Practical Tip: During the assessment process, make it clear that while all recommendations are valuable, there should be a commitment to prioritise and review them over time. Decision-makers should select a few key recommendations that are both feasible and impactful to implement first, with a plan to revisit others as circumstances and resources allow.

Lesson 9: Capturing Indirect Outcomes, New Partnerships, and Organisational Shifts

A key lesson from the Project Towns was the importance of recognising not just the direct impacts of a Place and Wellbeing Assessment, but also the indirect outcomes that can emerge. These often include new partnerships, shifts in organisational practices, and other unexpected benefits that add value beyond the original plan.

Key Insight: Documenting these indirect outcomes and organisational shifts is crucial, as they can lead to long-term improvements in how organisations work together. Such outcomes highlight the broader impact of the assessment and demonstrate the value of a flexible approach that allows room for new opportunities and collaborations to emerge. By capturing these benefits, assessments can support the ongoing implementation and expansion of recommendations, leading to more effective and strategic outcomes.

Potential Example: the Assessment led to unexpected collaborations between housing associations and mental health services. These new partnerships addressed broader needs and provided additional benefits not initially outlined in the project proposal.

Learn More and Access Support

For more information, guidance, and access to resources, visit the [Shaping Places for Wellbeing web pages](#), where you can explore tools, templates, and examples that can assist in applying a place-based approach to enhance wellbeing.

Further contact details

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Acknowledgements

Thank you to the **Place and Wellbeing Collaborative** for developing the Place and Wellbeing Outcomes, having recognised the need for a consistent set of goals to help every place support people's ability to live, work, and relax in a healthy and thriving environment. One of the key applications of these Outcomes has been through the Place and Wellbeing Assessment, originally created by the Collaborative as a Rapid Scoping Assessment.

Special thanks go to the Shaping Places for Wellbeing Programme team, who refined this place-based approach, working locally in seven Project Towns across Scotland between 2022 and 2024 supporting councils, health boards and other stakeholders to embed a place-based approach in their decisions and actions.

The Shaping Places for Wellbeing Programme was a partnership between the **Improvement Service** and **Public Health Scotland**, funded by the Health Foundation and the Scottish Government. The work and insights from this initiative will continue under the **Planning for Place Programme**.

Place and Wellbeing Collaborative

The Collaborative brings together organisations committed to shared ambitions for place and well-being within national and local policy. Members include representatives from Public Health Scotland, the Improvement Service, Directors of Public Health, COSLA, Heads of Planning Scotland, and the Health Improvement Managers Network.

Improvement Service

The Improvement Service is the primary organisation for Local Government improvement in Scotland, aiming to help councils and partners enhance the health, quality of life, and opportunities for all people.

Public Health Scotland

Public Health Scotland is the national public health agency for Scotland, established to protect and improve the health and well-being of the Scottish population.

Planning for Place Programme

The Improvement Service's Planning for Place Programme provides dedicated support to councils and their partners, promoting collaboration in planning, resourcing, and delivering places that enable communities to thrive.

Appendix 1: Example Briefing Note

Briefing: Place and Wellbeing Assessment for Clydebank Health & Care Centre Green Travel Plan

Introduction

This Briefing Paper aims to set the context and provide some information as a basis for discussion during the Place and Wellbeing Assessment. In preparation for the session, we would ask that you take some time to become familiar with the content of this briefing paper and the [Place and Wellbeing Outcomes briefing paper](#).

What is a Place and Wellbeing Assessment?

A [Place and Wellbeing Assessment](#) involves a workshop pulling together expertise and perspectives from attendees to consider a plan, policy or decisions which impact on delivering a place that enables wellbeing. To do this, attendees consider impact on the evidenced features for all our places that, if we get them right, enable the community living, working and relaxing there to enable their health and wellbeing. These are called the [Place and Wellbeing Outcomes](#).

As there is no one “community,” the Assessment also considers impact on different population groups. Within the Shaping Place for Wellbeing Programme this means with a lens on who is experiencing the most significant impact from inequality in that place.

How does it link to Shaping Places for Wellbeing Programme?

The Shaping Places for Wellbeing Programme ambition is to improve Scotland’s wellbeing by reducing the significant inequality in the health of its people. The Programme objective is focused on the evidenced impact that the places where we live, work and relax have on our health and wellbeing. This impact can be positive or negative and this Programme aims to ensure these unintended consequences are fully considered when we make decisions about a place. A Place and Wellbeing Assessment is our starting process for supporting decision makers awareness of unintended consequences. Particularly on those most being impacted by inequality within the Project Town.

What will be involved in the Clydebank Health & Care Centre Green Travel Plan Place and Wellbeing Assessment?

This 3 hour online facilitated session will involve asking participants to use their knowledge and expertise to discuss how the Green Travel Plan for Clydebank Health and Care Centre can positively impact the wellbeing of the community. Using the Place and Wellbeing Outcomes, discussion will focus on each of the 5 Outcome areas of Movement, Space,

Resources, Civic and Stewardship to discuss and share perspectives about how these contribute to the health and wellbeing of the people living in Clydebank.

The Place and Wellbeing Outcomes are a consistent and comprehensive list of what every place needs in order for people to thrive. By acting in these areas, evidence suggests that it could improve the health of people and planet and contribute to tackling health inequalities.

Following this session, a Report will be produced by the Shaping Places for Wellbeing Programme team highlighting the discussion that took place and provide recommendations, with associated evidence, which if implemented could contribute to delivering a place that supports health and wellbeing according to their contribution to delivering the Place and Wellbeing Outcomes.

Participants will also be asked for feedback on the Assessment process as part of the Programme evaluation to inform ongoing learning and quality improvement of programme delivery.

It is hoped that the outcome of this Assessment Session will:

- Provide a report that will inform the final version of the Green Travel Plan for Clydebank Health & Care Centre and support the aspirations of the West Dunbartonshire HSCP Strategic Plan.
- Offer an opportunity for the Steering Group and key stakeholders to become more familiar with the process of the Place and Wellbeing Assessment and begin to understand the benefits of using these outcomes to inform decision making.
- Form part of an ongoing process linking into other local strategies and plans which will bring in wider stakeholders including the community.

Context for discussion

This Assessment session will focus on the Green Travel Plan for Clydebank Health & Care Centre.

Travel Plans provide advice on sustainable travel and set out measures to encourage the adoption of sustainable travel. Travel Plans also encourage modal shift from car journeys (particularly single occupancy car journeys) to more sustainable modes such as active travel and public transport. This can help tackle some of the congestion and environmental problems at a local level.

West Dunbartonshire Health & Social Care Partnership has a major role to play in encouraging staff, patients and clients to use sustainable travel modes, especially active travel, which will lead to increased levels of physical activity. The development and implementation of a Green Travel Plan for Clydebank Health & Care Centre provides an opportunity for the organisation to implement best practice and lead by example.

Implementation of the Green Travel Plan has been impacted by several factors (including Covid) since the opening of the new Clydebank Health & Care Centre over a year ago. As part of the review of the Green Travel Plan this year, staff and patient travel surveys were administered to ensure access to the most up to date experience of travel to facility.

It is intended that this Place & Wellbeing Assessment forms part of the review process, along with analysis and consideration of the recent surveys to inform a final version of the Green Travel Plan and its implementation.

Area and priority groups for consideration

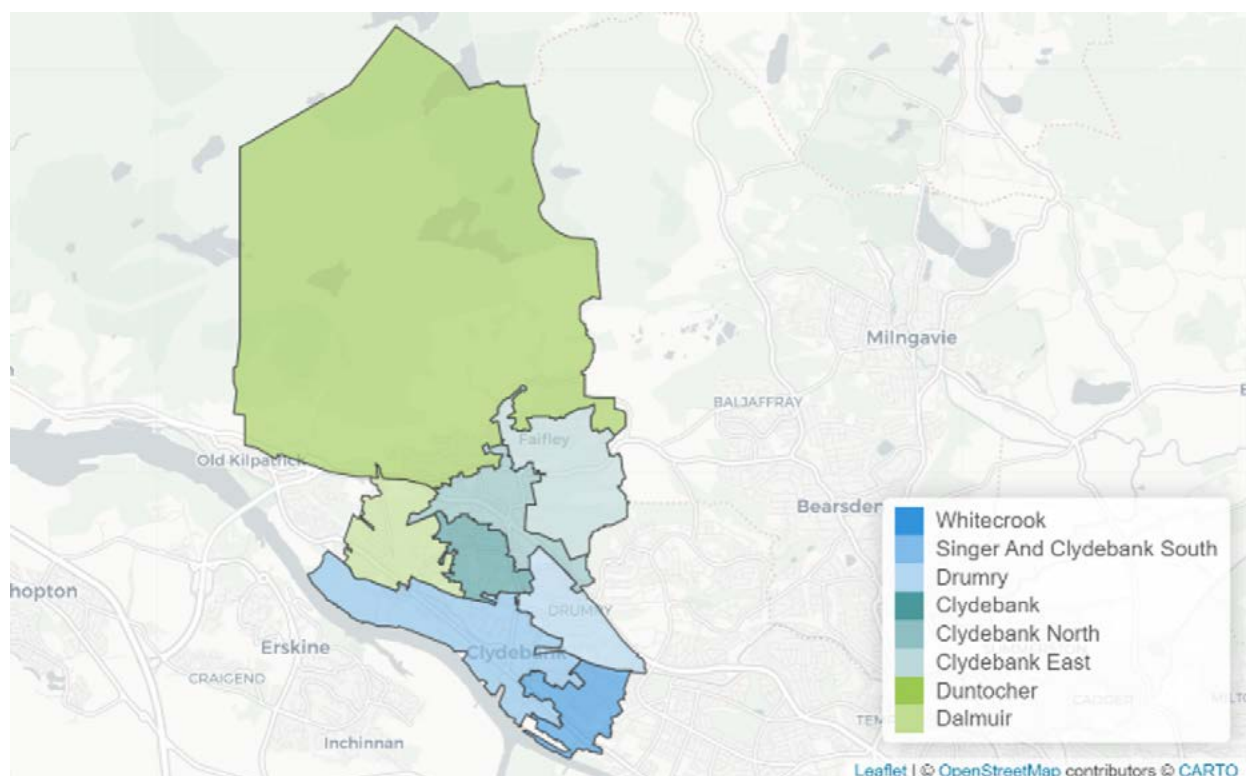
For the purposes of this discussion, all of the Intermediate Zones that form Clydebank Locality as used by West Dunbartonshire Health & Social Care Partnership will be considered. These areas are illustrated on the map below.

Using the data gathered by Public Health Scotland's Local Intelligence Support Team, as part of the Shaping Places for Wellbeing Programme, discussions will also consider priority groups highlighted in this data.

This will include all those living in Clydebank:

- People living in poverty
- People experiencing mental health issues
- People experiencing substance misuse (alcohol)
- People at risk of premature morbidity

Map for Clydebank town Profile Map (provided by Local Intelligence Support Team, Public Health Scotland)



Appendix 2: Examples of Recommendation Wording

Examples of recommendation phrasing

- “Within the introduction, highlight the importance of addressing local inequalities in access to services.”
- “Develop a communications and engagement plan that ensures input from underrepresented groups in the community.”
- “Refer to xxxx national guidelines on sustainable transport to strengthen the proposal’s alignment with best practices.”
- “Incorporate additional green spaces to improve mental wellbeing and encourage active lifestyles.”
- “Ensure collaboration with local health services to address the specific needs of vulnerable population groups.”

Nov 2024

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