

Market Towns Healthcheck Handbook



March 2005

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Healthcheck
Handbook

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Foreword

Market towns are at the heart of life in rural England. For centuries these towns have been the focal point for commercial and social activity. They have been places in which to find work, to buy and sell goods, and to find valued specialist services. But in recent years many of these functions have been undermined by social, industrial and agricultural change. Some towns are adapting to these changing demands and are thriving, but many are in decline.

There is a new role for market towns in the 21st century: revitalised towns which meet the needs of local people and which provide access to a wide range of retail, leisure, professional and public services. Most importantly, they should be towns whose futures are shaped by the people and communities who live in and around them.

The action planning approach, based on the Countryside Agency's healthcheck, has proved its usefulness in more than 200 communities already. It has acted as a catalyst, drawing together disparate groups and activities, and providing the tools to engage the local community and a wide range of partners. It has created a sense of identity, helping to instil a feeling of pride and sense of purpose within the community. And it has demonstrated that communities within the towns have the skills and resources available to influence their regeneration, future role and identity. This revised handbook incorporates many of the lessons drawn from their experience.

The healthcheck helps local people to appraise the strengths, weaknesses, future demands and opportunities of market towns. It is part of a much bigger toolkit which has also been revised and updated, giving people access to the funding and advice needed to take action to revitalise towns. By applying the toolkit, getting involved in a local partnership and carrying out a healthcheck you will be helping to create an exciting new future for your town. You can also access a national network of towns doing similar work, through Action for Market Towns, and benefit from their advice.

On behalf of Action for Market Towns, therefore, I welcome this revised handbook and encourage you to become involved. Market towns matter.



Julian Owen, Chairman, Action for Market Towns

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Introduction

What is in this handbook?

This handbook is a practical guide to carrying out a market town healthcheck. It has been written for people in market towns and the surrounding countryside or 'hinterland' who want to take action to revitalise their town.

The handbook is:

- ❖ a guide to the stages involved in setting up a market town partnership, carrying out a healthcheck, drawing up an action plan and putting the plan into action;
- ❖ part of a web-based toolkit that offers advice for market town improvements, including advice on routes to obtaining financial support;
- ❖ not a prescribed set of rules, but a reference book that can be adapted to local circumstances.

As well as the handbook there is a lot of information available on the internet that may be helpful in completing the healthcheck. Much of it is free.

What is a market town?

The term 'market town' covers towns in rural England with a variety of backgrounds, including those that have traditionally hosted an agricultural market, as well as seaside resorts, fishing ports, mining and manufacturing towns. Populations range roughly from 2,000 to 20,000, but the ability to serve people in both the town and its surrounding countryside is more important than the town's size.

The way a town functions depends on how it is used by people living in the town itself and

by those living in outlying rural communities. Any approach to market town revitalisation needs to consider people in both the town and the surrounding countryside. 'Market town' is used here as a shorthand for both the town and the surrounding countryside.

Gaining a good understanding of the functions of a town is not necessarily easy. Rural lives have become increasingly complex. It is unlikely that market towns are centres for nearly all the activities of their residents, and for those of people living in the 'hinterland'. The service and employment roles of a town vary considerably from town to town, and are also quite different for town residents and those living in the hinterland.

Some market towns are in good health and some are experiencing decline. All market towns have the potential to be:

- ❖ comprehensive local service centres where people can access professional services such as solicitors, surveyors, opticians and travel agencies;
- ❖ distinctive places where development for housing and jobs is welcomed because it reinforces the character of the place while meeting the needs of rural society;
- ❖ centres for the processing of local products, especially food;
- ❖ places where the range of shops meets the needs of people from the rural hinterland;
- ❖ locations for farmers' markets;
- ❖ focal points for properly planned and coordinated local transport networks;
- ❖ centres for culture – art, music, theatre or cinema;

- ❖ hubs or gateways for tourism, capitalising on the assets of the place and the nearby countryside;
- ❖ access points for a wide range of training, education and employment opportunities.

What is the hinterland?

Traditionally, market towns have been thought of as the main centres for services and employment for people who live in the hinterland – (the rural areas surrounding a town).

This concept is based on the idea that distance is the main constraint on people's activities in the countryside, for reasons either of cost or convenience. But levels of rural car ownership and use are at an all-time high, and in real terms the cost of motoring has never been cheaper. This means that rural

lives are much less constrained by distance, and this has direct implications for market towns and their hinterlands.

People in the hinterland use the town differently from town residents and in general are far less 'attached' to the town than is usually supposed. Place of work generates different patterns once again, giving some of the longest average travel distances to a surprisingly wide range of destinations. No two towns appear to be alike, and their functions will be determined by the mix of:

- ❖ the nature of the town;
- ❖ the nature of the town's location relative to the villages and the open countryside, and the influences of infrastructure such as transport links;
- ❖ the relationship with other towns – this factor is particularly influenced by infrastructure.



Box 1 The hinterland

Here are some essential factors to bear in mind when trying to define the hinterland:

- ❖ Simple distance or travel time should not be taken as a direct indicator of the functional connection between a town and its hinterland.
- ❖ Administrative boundaries (wards, districts, etc.) are just that – boundaries convenient for administration. They do not indicate function.
- ❖ It is not sufficient to define hinterland just in terms of the areas that a town might want to be more closely associated with – the proper focus must be on what is actually happening.
- ❖ Sources from which you might gain an indication of the extent of the hinterland include school catchment areas, health facilities, transport schemes, the locations of registered users of a range of public services, and of customers of businesses in the towns.
- ❖ Shared knowledge and views of the members of the partnership may be useful for defining the hinterland – but be careful, as there is a tendency to both under- and over-exaggerate.
- ❖ It is unlikely that a town will have a unified service role for residents of the hinterland – people will make greater use of the town for some services than for others.
- ❖ It cannot be assumed that people will make similar trips for service use and work – people tend to live different service and work ‘lives’.
- ❖ In some areas, nearby towns may have interrelated functional roles such as either sharing roles or ‘borrowing’ each other’s specialisms and strengths.
- ❖ The ways in which townspeople and hinterland residents use the town will be quite different.
- ❖ Hinterland is not a ‘tidy’ concept – a town’s functional influence will vary for different functions and will be blurred because of influence from neighbouring towns and urban areas.

Don’t worry if you don’t have a ‘perfect’ collection of information with which to establish your town’s hinterland. Given the essentially variable nature of contemporary hinterlands, there is unlikely to be just one right way to establish them. The task is far more a matter of collecting together enough useful information to gain sufficient understanding of the town’s functions, and hence the nature of its hinterland, in order to give confidence in planning for its future.

What is a market town healthcheck?

The market town healthcheck:

- ❖ allows local people to identify the economic, environmental and social strengths and weaknesses of a market town and its surrounding countryside;
- ❖ helps people to identify the impact of changing local circumstances;
- ❖ is a sound basis for creating an action plan for revitalisation.

It differs significantly from audits or surveys that focus on town centre activities, which concentrate typically on a narrow range of

retail and related services. This healthcheck not only covers the whole town and its surrounding countryside, but enables people to look at a wide range of connected issues that affect the quality of life. It can be used by people in market towns of any size (see Box 2 below). The healthcheck, leading to a rejuvenated and healthy market town, will benefit residents and visitors alike (see Box 3 on page 5).

The healthcheck consists of a series of worksheets that contain questions about environmental, social and economic issues. Answering the worksheets can lead to a vision for the future of the town, from which a plan of action can be prepared. Carrying out a healthcheck requires commitment from all members of the community; it is a process that is led by a partnership of market town interests.

Box 2 Community participation in the market towns healthcheck

What is it...?

- ❖ A means to unlock the ideas, resources and commitment that exist in all communities, and to direct them to managing change and delivering that shared vision.
- ❖ A practical and democratic way to involve the community as widely as possible in the future of the town and its surrounding countryside.
- ❖ A means to devise and deliver an action plan and specific projects, which have widespread support, in order to help achieve the vision over the short, medium and longer terms.

... and what can be achieved?

- ❖ Mutually supportive working links between different sections of the community, including businesses, service providers, voluntary groups, the public sector and the community at large.
- ❖ A shared vision of the future identity, function and quality of life in the town, which meets the needs of its residents and the people it serves in the surrounding area.
- ❖ A sustainable future for the town and its hinterland, embracing business, transport, the environment, and social and community facilities.
- ❖ The reinforcement of civic pride and identity, strengthening existing community groups, and the resolution of long standing differences of view between different groups in the community.

Box 3 The benefits of the market towns healthcheck

- ❖ A way to bring residents of the town and the surrounding countryside together.
- ❖ An inclusive approach to regeneration that involves all ages and sections of the community.
- ❖ A tool for communities to understand their strengths and weaknesses, and devise a shared but achievable vision for regeneration and revitalisation.
- ❖ A way to set standards and learn from what is happening in other successful community development and regeneration projects.
- ❖ A way to produce practical action plans which direct resources and effort to achieving real improvements and projects.
- ❖ A key tool in producing robust action plans which have widespread community support and that secure funding and support from national, regional and local programmes for revitalising rural and urban communities.
- ❖ A way to produce a properly researched action plan that is influential in the decisions that public authorities have to make; for instance, in local plans, transport and health service investment programmes.

What is an action plan?

An action plan is a tried and tested way of setting out projects that will assist in revitalising a town. A successful action plan will demonstrate that the pressures and opportunities identified during the healthcheck are being addressed, and that the projects that are taken forward complement rather than duplicate initiatives already in place. Putting the plan into action usually requires a project manager who supports the market town partnership and helps acquire funding and advice.

What is involved in carrying out a healthcheck?

The stages of carrying out a healthcheck and preparing an action plan are illustrated in Figure 1 on pages 6–7. They are:

- 1 Setting up a market town partnership
- 2 Gaining community commitment
- 3 Completing a healthcheck
- 4 Creating a vision
- 5 Preparing an action plan
- 6 Putting the plan into action
- 7 Sustaining the partnership

Figure 1: Market towns healthcheck

1 Setting up a market town partnership

Purpose:

- ❖ To set up a partnership that represents the main interests of people in the town and surrounding countryside.
- ❖ To organise the partnership to carry out a healthcheck, set a vision for the town and its rural area, prepare an action plan, and put the plan into action.

Main elements:

- ❖ Ensure the membership and size of the partnership reflects both its aims and the breadth of issues that affect a particular town.
- ❖ If possible, appoint someone to act as a coordinator to work closely with the partnership to carry out the healthcheck.
- ❖ Appoint a steering group with members and a chairperson.
- ❖ Set up working groups to take on responsibility for tackling specific worksheets.
- ❖ Seek specialist advice from professionals working for organisations in the town, or who provide specific services, such as the district, unitary or county council.
- ❖ Involve communities in the town and surrounding areas.

2 Gaining community commitment

Purpose:

- ❖ To get a full understanding of the healthcheck and involvement from people in the town and surrounding countryside.

- ❖ To map out the main issues of concern to the community.

Main elements:

- ❖ The partnership needs to arrange a community event to establish the issues of concern.
- ❖ Identifying the strengths, weaknesses, opportunities and threats facing the town.

3 Completing a healthcheck

Purpose:

- ❖ To draw together a ‘snapshot’ of the town and surrounding countryside.
- ❖ To tackle the questions in the worksheets which help identify strengths and weaknesses.
- ❖ To draw together the results in a report, in preparation for creating a vision and drawing up an action plan.

Main elements:

- ❖ Carry out a factual ‘snapshot’ of the market town to provide a background that can be balanced with the community’s aspirations.
- ❖ Answer worksheets covering these four main topic areas: environment, economy, social and community issues, transport and accessibility.
- ❖ Draw the results together to highlight problems or opportunities that should be acted upon.
- ❖ Hold an event, to which all members of the partnership and invited members of the community attend, to agree the healthcheck.

cont.

4 Creating a vision

Purpose:

- ❖ To work with the community to create a vision for the town and surrounding countryside based on the healthcheck.

Main elements:

- ❖ Hold a community event to establish a vision.
- ❖ Prepare a report on the vision containing terms of practical objectives.

5 Preparing an action plan

Purpose:

- ❖ To prepare an action plan to achieve the objectives agreed in the vision.
- ❖ To secure community support for the action plan.

Main elements:

- ❖ Take the vision into account.
- ❖ Identify available resources.
- ❖ Identify priorities for action.
- ❖ Establish monitoring and evaluation criteria.

6 Putting the plan into action

Purpose:

- ❖ To put the plan into action and achieve results.

- ❖ To monitor and evaluate progress.
- ❖ To review the vision and action plan.

Main elements:

- ❖ Appoint a project manager.
- ❖ Set out a clear programme of action.
- ❖ Demonstrate achievements to the partnership, wider community and funding partners.
- ❖ Monitor and evaluate results.
- ❖ Review the vision and action plan.

7 Sustaining the partnership

Purpose:

- ❖ To review the structure, function, and performance of the partnership.
- ❖ To make sure the partnership continues to represent the main interests of people in the town and surrounding countryside.
- ❖ To plan for the ongoing success of the market town action plan.

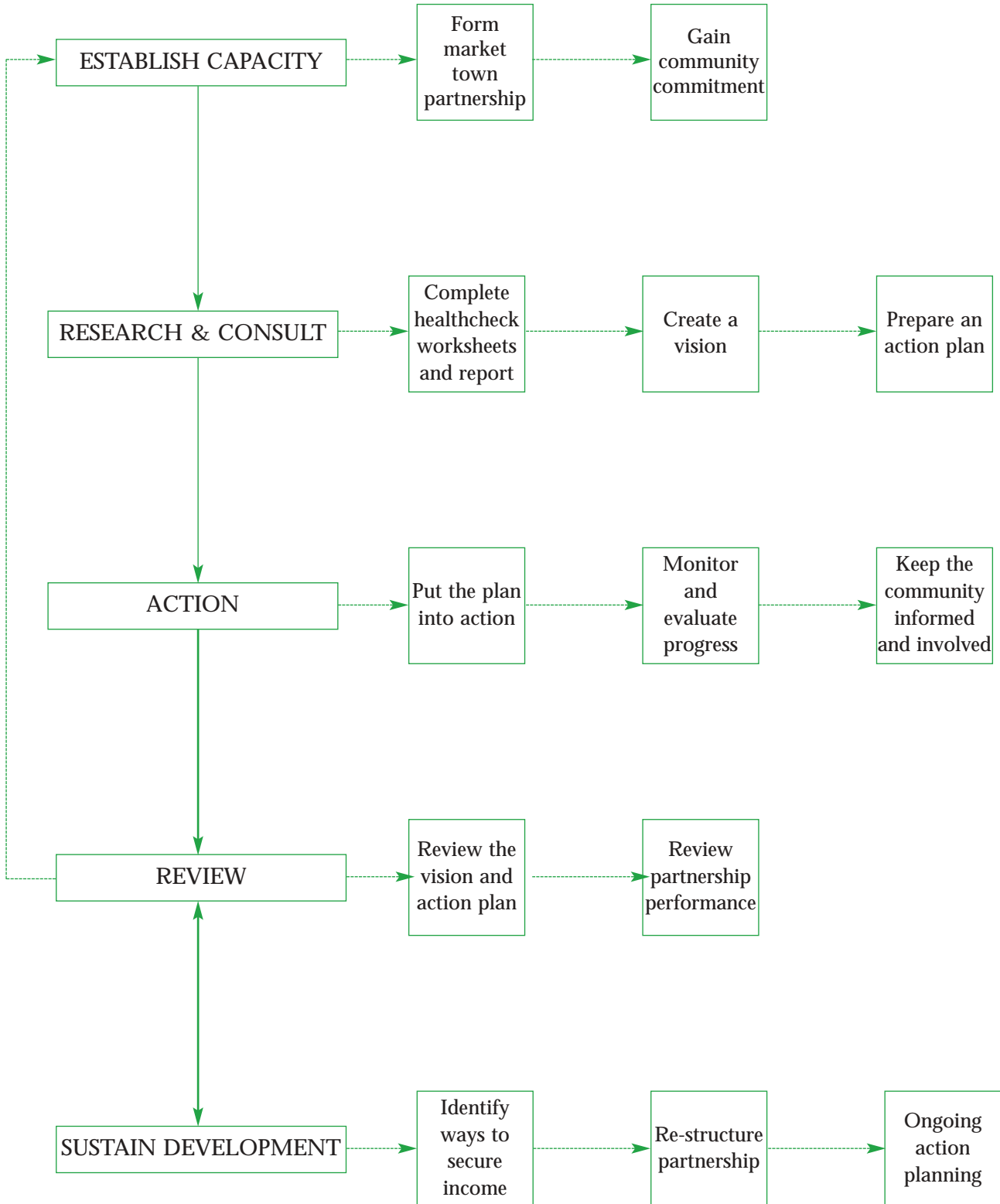
Main elements:

- ❖ Clearly identify the roles and responsibilities for those in the partnership.
- ❖ Restructure a partnership to take on a legal structure appropriate to its function.
- ❖ Find ways to reduce reliance on short-term funding and explore opportunities for greater financial independence.

Figure 2 below shows how the stages and actions relate to each other. Not all towns will need to start at Stage 1. Some towns will find they are already well on their way in terms of establishing an effective partnership or

getting community commitment. In such cases towns should pick up the healthcheck process at whatever stage is considered most appropriate.

Figure 2: Healthcheck process flow diagram



How long will it take?

For market towns that have already established a local partnership, completing a healthcheck and preparing an action plan following the guidance in this handbook may take nine to twelve months. This will allow time to arrange workshops to involve the wider community, complete the worksheets, and produce an action plan based on a shared vision. The timescale may need to be extended for market towns that have yet to establish a local partnership.

Putting the plan into action will take a varying amount of time depending on the market town. Straightforward projects might be able to get under way immediately, but a project manager may need to be in place for up to three years to get major projects under way.

What else can a healthcheck do for a market town?

The functions of a town, and so the nature of its hinterland, are strategic issues.

Organisations involved in community, public service and development planning, transport planning, economic development, and a range of other work, are all interested in stitching together different places, including market towns, to build up broader strategies and plans to bring about change. Such work has often been unable to capture local detail down at the level of individual towns, and so has relied on rather generalised views of their function and roles.

The market towns healthcheck provides a critical opportunity to change these generalised views if a detailed understanding of the functions of a town and nature of its hinterland is assembled. As a result, the strategic situation of the town can be fitted into the broader strategies more accurately; in

turn, those broader strategies can better serve the needs of the people in the town and hinterland.

Thus, the functions of the town and the nature of its hinterland are not things that only the town is interested in – the partnership should ensure that these healthcheck findings reach their wider audience. In particular, by documenting the concerns of the community, the healthcheck and action plan can be invaluable in providing evidence to inform the Community Strategies prepared by Local Strategic Partnerships (LSPs). Guidance on good practice in establishing links between community-led action plans and Community Strategies has been published as *Planning for Vital Communities*, which is available via the website.



They did it – you can too

Defining the hinterland of Okehampton

The importance of defining the hinterland with reference to the function of the town has been clearly demonstrated for Okehampton. Maps were prepared showing trips to Okehampton and other centres from the town itself and sample villages. The maps were based on surveys of local people's shopping patterns and work places. These show that although the town has a strong role for supermarket shopping for surrounding villages, its role is considerably decreased for non-food shopping – and Exeter's is consequently increased. Also, while the town has a dominant role in the provision of employment for its own residents (and a third of those who work in the town walk to work), only a quarter of village residents work in the town.

None of these findings may be surprising for the residents of Okehampton and surrounding villages, but what is important is that the findings provide essential, previously absent, detail of direct relevance to work on the town's future.

The research relied on local survey work to fill in the detail of the town's functions. Data from the 2001 census can be manipulated to show commuting patterns, but there is no readily available data on service use – this has to be gathered locally. Conducting a service use survey may not be as onerous as it sounds – only 190 individual interviews were needed in Okehampton and the surrounding villages.

The research report, *The Role of Rural Settlements as Service Centres (2004)* prepared by Land Use Consultants gives more detail of how to undertake this sort of work. It is available at www.countryside.gov.uk

1 Setting up a market towns partnership

Purpose:

- ❖ To set up a partnership that represents the main interests of people in the town and surrounding countryside.
- ❖ To organise the partnership to carry out a healthcheck, set a vision for the town and its rural area, prepare an action plan, and put the plan into action.

The best way to undertake a market town healthcheck and prepare an action plan is to set up a partnership that represents the main interests of people living in the town and surrounding area. Healthchecks in market towns have not always been done by community partnerships; some have been completed by local authorities, tourist boards, town centre managers or business groups. Where such healthchecks already exist, they will provide useful information for answering the worksheets referred to in this handbook. You must be aware, however, that the approach recommended in this handbook is community-based: the healthcheck and action plan should represent the views of those living and working in the area.

1.1 Role of a partnership

If the healthcheck and action plan are to be properly based on the community's needs and aspirations, and owned by those people, then a partnership must draw its membership widely from the town and immediate surrounds. Ownership and involvement of the wider community are essential to address many issues that require:

- ❖ detailed local knowledge and skills;

- ❖ people to make choices about the future they want to experience;
- ❖ the commitment of businesses and individuals, alongside public agencies, to deliver results.

A partnership can be defined as 'a coalition of organisations and individuals who agree to work together for a common aim, or a set of compatible aims' (Civic Trust). The key to partnership working is the sharing of resources and responsibilities between members, who should ideally work together in a cooperative and mutually supportive way.

A partnership should be transparent; in other words everyone must be clear about the aims of the partnership, there should be no secrets, and there should be mutual trust. Regular checks to ensure that all the partners are content should take place. No one who has been involved, even in successful community partnerships, will deny that partnerships can be demanding, difficult and complicated, particularly when trying to agree a course of action involving groups and individuals with very different perspectives. Community partnerships do, however, ensure that everyone is involved and everyone takes 'ownership' of the process.

1.2 Organising a partnership

There is no 'right' or single way in which a local partnership should be structured. Equally, there is no given set of organisations that must be represented, or a standard way in which the partnership should operate. This is a matter for each community to decide. The membership and size of the partnership

should reflect both its aims and the breadth of issues that affect a particular town.

The membership should be as inclusive as possible and reflect the interests of communities in the rural areas around the market town as well as in the town itself. Members can be drawn from interest groups and agencies. The town or parish council is a good place to start. Suggested members are given in Figure 3 on page 13.

Many small towns have numerous voluntary groups. For example, Burnham-on-Crouch, an Essex town of fewer than 8,000 people, has over 80 registered groups. There will also be local individuals, not necessarily members of organised groups, who could have an important role to play in developing local initiatives.

The decision to bring people together could be taken by an individual or group of people, by the district, unitary or town or parish council, or by a pre-existing partnership or initiative in the town. The local newspapers (including any community newsletter), radio and television may be interested. These media can widen attention and keep local people informed.

A number of organisations have experience in establishing and working with local partnerships. Those that may be able to provide help and advice in setting up a local partnership include:

- ❖ the local rural community council;
- ❖ the local district, unitary or borough council;
- ❖ Action for Market Towns;
- ❖ the Civic Trust Regeneration Unit;
- ❖ established market town revitalisation partnerships elsewhere in the region or further afield.

Communities that already have a partnership or some other locally based initiative such as a health action zone, or Business Improvement District will be able to draw on the advice given later in this section on how the partnership can be widened to do a healthcheck and action plan. It is important to give the partnership a structure that enables it to complete the healthcheck and implement the action plan. Since its resources are the skills and energies of its members, the partnership, at this stage, does not need to be a legal entity. This will, however, become important once the partnership takes on managerial and administrative responsibilities such as employing a project manager. Chapter 7 gives more details about partnership structures and responsibilities.

An open forum or community partnership structure is suitable for the early stages of market town revitalisation. The structure is outlined in Figure 4 on page 14. Some of the main principles for successful community partnerships are set out in Box 4 on page 15. These flexible arrangements can work for every scale of town and community, and can be expanded or contracted as appropriate. A partnership does not have a hierarchy or 'pecking order', and each of the components has a complementary role to play in achieving results. Rather like a jigsaw, the pieces should fit together synergistically, so that the sum is greater than the parts.



Figure 3: Suggested organisations to involve in a market town partnership

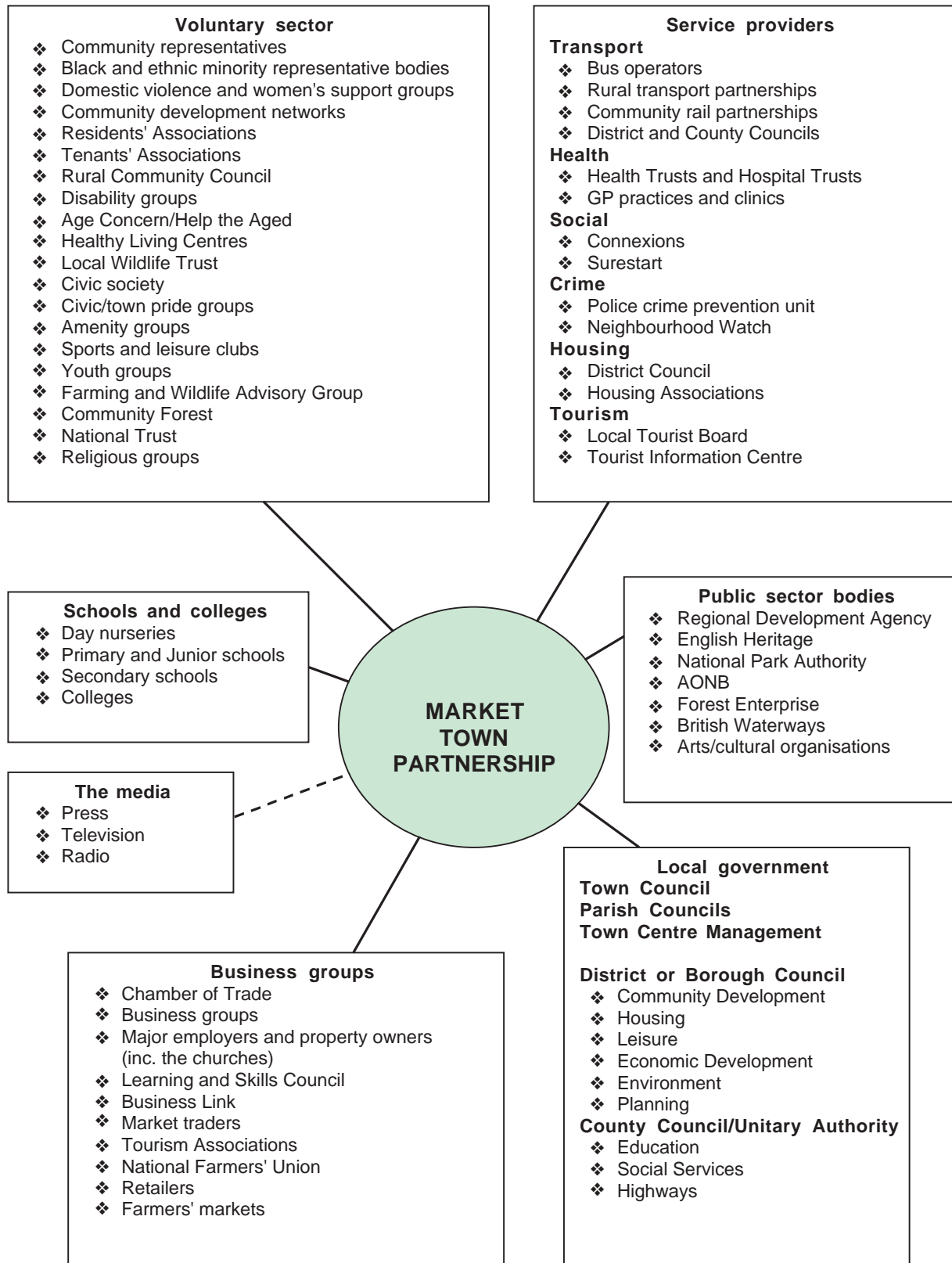
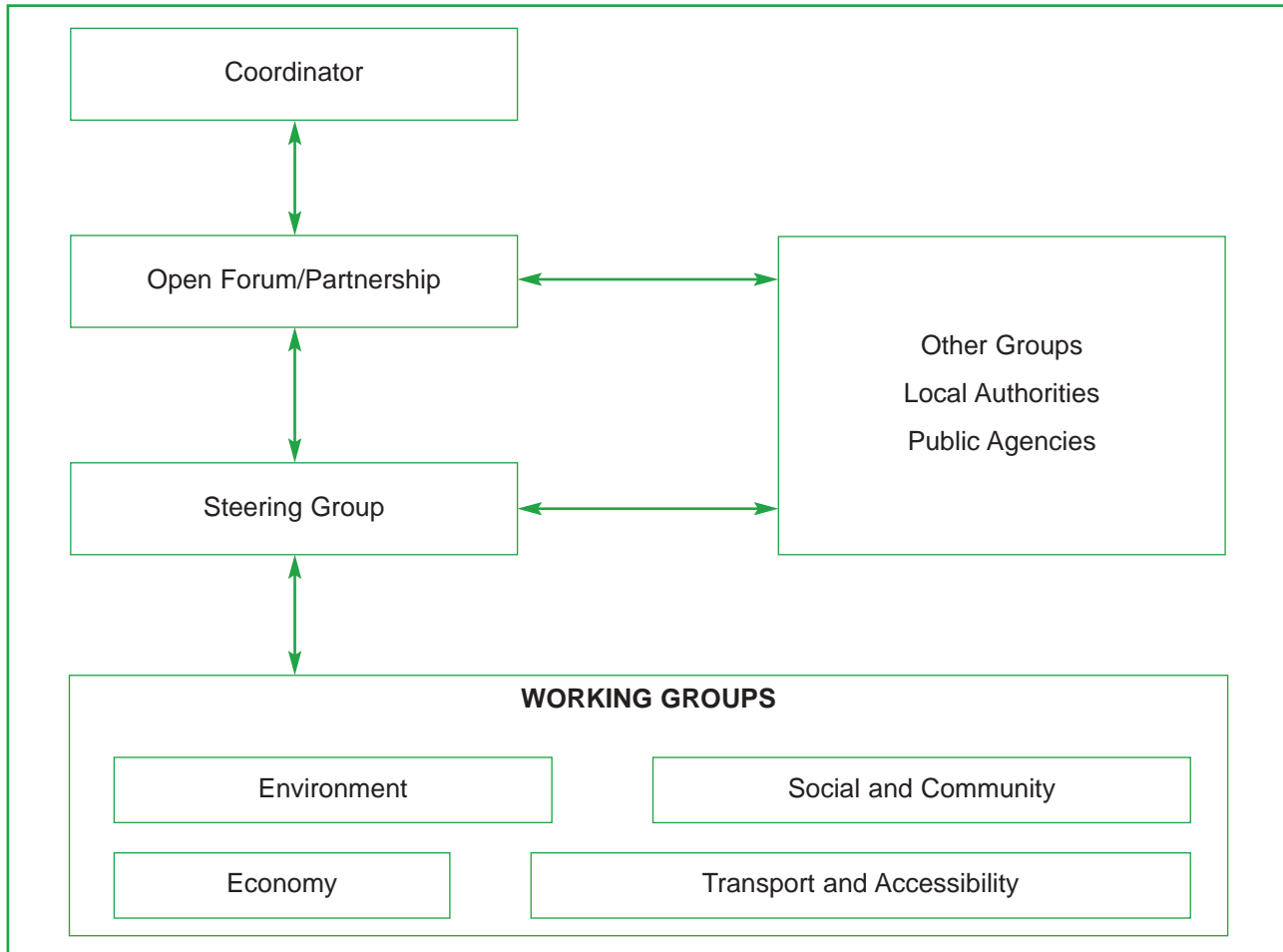


Figure 4: Structuring the market town partnership



1.3 Role of a healthcheck coordinator

Carrying out a healthcheck and preparing an action plan are activities that need to be coordinated. The partnership will benefit from having someone to act as a coordinator who should:

- ❖ work closely with the partnership, its steering group and chairman. He or she will oversee all activities involved in doing a healthcheck and preparing an action plan;
- ❖ organise the community event which gains commitment and identifies the main issues of concern;
- ❖ work closely with the working groups which answer the healthcheck worksheets;
- ❖ report back on results and work with the partnership to create a vision;
- ❖ prepare an action plan based on the vision;
- ❖ agree an action plan with the wider community.

The ideal candidate will have a broad understanding of market towns and rural revitalisation. He or she will also have:

- ❖ good local knowledge;
- ❖ community participation skills;
- ❖ organisational ability;
- ❖ ability to communicate effectively with a range of people.

Box 4 Principles of successful community partnerships

- ❖ They are not hierarchies, just an effective way of working together.
- ❖ The forum should meet regularly, embrace new members and act mainly as an endorsing and consultative group.
- ❖ As the initiative evolves, alter the membership of the steering group, keeping it to no more than 10–12 people.
- ❖ The steering group should have clear but flexible terms of reference to coordinate and, in due course, manage the action plan, staff and budgets.
- ❖ Look inside the partnership for a suitable coordinator, who should become a member of the steering group. Appoint a full or part-time paid coordinator as the initiative evolves and funding permit.
- ❖ Set up working groups to address key issues and interests. The working groups should have equal status to the steering group and include at least one steering group member. Limit the number of working groups. Give them clear and preferably non-overlapping terms of reference. The role of working groups is to focus on particular issues, work through the healthcheck worksheets, and report back to the steering group and the partnership as a whole.
- ❖ In due course, working groups can be used to devise and implement specific projects and initiatives. When they have done their job(s), bring their members back into the main partnership.
- ❖ Create close links to other community groups and initiatives. Do not try to take them over or ignore them.
- ❖ Involve staff and members of local authorities and other relevant agencies as observers and advisors. In time, key individuals should be invited to join the steering group.

The district, unitary or county council, or the local rural community council, may already employ someone who could take on the coordinator role. There may be another community or town centre management project in the vicinity that might spare someone on a part time basis. In addition, there could be a resident who has the skills, time and enthusiasm to take on the task in a voluntary capacity. A coordinator could be employed by the partnership through financial contributions from its members. Support could be available from the regional development agencies for coordinators in specific towns.

In the words of a town councillor who has enthusiastically been involved in a healthcheck, a coordinator needs to have good 'circus skills'! Detailed suggestions for the skills, experience and knowledge to be looked for in the coordinator are available on

the website. In reality, successful coordination will depend on the person having a positive attitude, confidence, and the ability to learn quickly.

1.4 Steering a partnership

The partnership will need a steering group comprising members and a chairman or chairwoman ('Chair'). The partnership Chair will have a significant influence on how the partnership works and how successful it is. The Chair will need the ability to deal with potentially difficult issues and, sometimes, pushy people. Box 5 on page 17 highlights the key skills needed for successful Chairs and steering groups.

- The role of the steering group is to:
- ❖ direct the coordinator's work if he or she is answerable as an employee to the partnership;



Box 5 Skills and experiences for effective steering groups

Essential skills and experiences: Chair

- ❖ Chairing meetings effectively
- ❖ Being politically astute
- ❖ Having general knowledge of the private, public and voluntary sectors
- ❖ Dealing with the media
- ❖ Negotiating solutions to tensions and conflicts to build consensus
- ❖ Understanding dynamics of partnerships and steering groups
- ❖ Appraising performance
- ❖ Acting independently of local political interests

Desirable skills and knowledge: members of the steering group

- ❖ Project Management
- ❖ Financial Management
- ❖ Promotional skills and dealing with the media
- ❖ Knowledge of the private, voluntary and public sectors
- ❖ Working with socially excluded members of the community
- ❖ Securing funding
- ❖ Succession planning
- ❖ Community Development

- | | |
|---|--|
| <ul style="list-style-type: none"> ❖ help the coordinator to arrange the events that identify the main issues; ❖ report back to the community on the results of the healthcheck; ❖ assist in the preparation of the action plan. | <ul style="list-style-type: none"> ❖ make sure that partnership members are clear about their individual and collective roles; ❖ make sure that any working groups have defined responsibilities and roles; ❖ build consensus among different interest groups; ❖ oversee regular progress reports. |
|---|--|
- The Chair should:
- ❖ work closely with the coordinator on all aspects of the healthcheck;

1.5 Role of working groups

These will take on responsibility for tackling specific worksheets. The number of working groups and their terms of reference will need to flow from the first community event which identifies the issues to be looked at, and the interests and concerns of the partnership members. Most members will have a strong interest in a particular topic and are likely to gravitate to working groups which reflect these.

The role of a working group is to:

- ❖ address specific issues;
- ❖ generate community involvement in the healthcheck;
- ❖ complete the worksheets;

- ❖ help report the healthcheck results back to the wider community;
- ❖ generate ideas for future action;
- ❖ research and evaluate those ideas.

1.6 Obtaining specialist advice

Most towns have people with the relevant skills and experience needed to support the healthcheck. Members of the partnership, or people they know, can fill most of the gaps. Partnerships should look to secure support from professionals working for organisations in the town or in providing specific services to the town, such as the district, unitary or



county council, tourist board or learning and skills council. Potential sources of advice are illustrated in Figure 5 on page 20. Ideally advice and help should be sought as an 'in-kind' contribution from these organisations as a sign of commitment to the revitalisation programme. However, the reality is that public sector organisations face constraints on their staff time and budgets, and market town partnerships may need to secure funding to 'buy in' some professional advice. Support could be available from the regional development agencies in specific towns.

1.7 Ensuring full community involvement

The partnership will need to consult and involve the wider community of the market town and surrounding countryside in doing the healthcheck and preparing an action plan.

There are at least four occasions when the community has an important role:

- ❖ at a community event to establish the main concerns and opportunities;
- ❖ taking part in workshops;
- ❖ taking part in an event to set and agree a vision;
- ❖ support in translating the resulting plan into action.

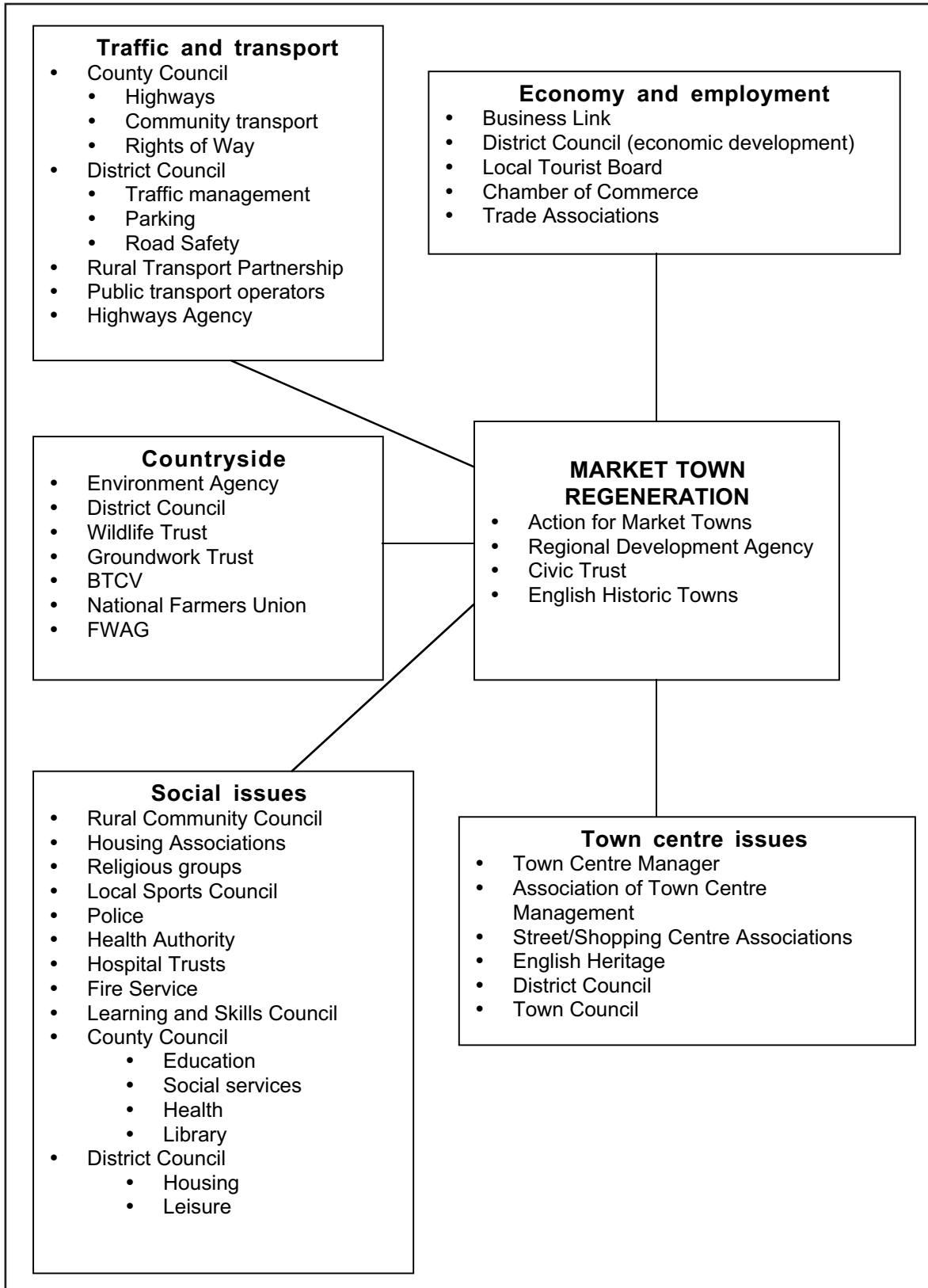
Widening the partnership offers an opportunity to bring in a broad range of groups and individuals to the process. It also provides a way of involving certain organisations that may not wish to be involved in the steering arrangements. For example, the district/unitary and county council may consider that they are better represented through membership of the wider partnership, rather than taking a lead role in the steering group, which should have a strong community focus. Major employers

and landowners may also be better placed as members of the wider partnership rather than being part of the steering group, but this depends on local circumstances. Box 6 on page 21 gives some advice on ways to make the partnership as inclusive as possible.

When widening the partnership, it will be useful to decide how wide to draw the boundary of the town's catchment area in order to establish the extent of a town's 'hinterland'. The Introduction covers some of the issues relating to hinterlands. Box 7 on page 21 is a reminder of ways in which the hinterland can be assessed, and thus a decision made about the partnership boundary. There will be no single obvious boundary except where the coast or other physical features create one. Many rural residents will use different towns for different services, or may well shop in one town for food, but in another, larger settlement, for clothes or furniture. A sensible boundary will include all those places where residents naturally look to the town for jobs, goods and services. It should not be drawn, however, so widely as to include villages where only a few people are likely to have any real concern for the future of the town itself. The interests of people from further afield, who visit or work in town, can be represented through surveys (for example, tourism surveys), or by the involvement of major employers and schools in the partnership.

It can be difficult to establish a single catchment area around the town where it overlaps or includes other market towns. This may be a case for considering a wider partnership to include several towns. Box 8 on page 22 gives some advice on how to develop a partnership to carry out the healthcheck for more than one town. There are already successful multi-town or area-based partnerships.

Figure 5: Sources of specialist advice



1.8 Regional market town groups

Regional forums have been developed in most of the regions, usually with the support of the regional development agency. They offer an integrated, strategic resource for market town revitalisation with the purpose of linking individual town partnerships with other partnerships and with outside agencies (such as the regional development agency, English Heritage, Business in the Community and

Action for Market Towns). By promoting joined-up thinking at the regional level, forum members can share good practice and access additional funding. Although they present another tier within the regeneration structure, they do provide a welcome common point of reference, advice and support. At their best, the regional forums can influence stakeholders to direct their own programmes to address the issues identified by market towns healthchecks.

Box 6 Making the partnership inclusive and representative

- ❖ Invite groups from all ages and sections of the community to join the partnership, making sure you involve 'hard to reach' and socially excluded groups such as the elderly, young people, black and ethnic minority groups, mental health groups and those with disabilities.
- ❖ Seek to involve children and young adults through:
 - schools, colleges and youth clubs;
 - inviting them to undertake information collation or vision projects;
 - separate workshops or special events.
- ❖ Use surveys and questionnaires to canvass opinion from across the community, including those who may not otherwise participate.
- ❖ Consult widely, using the local media and through the members of the partnership.
- ❖ Specifically engage communities in the countryside around the town.

Box 7 Deciding on the town's hinterland or catchment area

- ❖ There will be no single boundary that fits all services; but you need to decide how widely to set the limits of the partnership.
- ❖ Review any shopping, visitor or employment surveys done by the district council or others. Conduct your own survey of shoppers and visitors, if necessary.
- ❖ Ask local employers, and shop and leisure facility operators where their workforce or customers live.
- ❖ Consult the district and county council planning department, the rural community council, and town and parish councils.
- ❖ Consult local bus and rail operators.
- ❖ Talk to headteachers, college principals and the education department.
- ❖ Consult the local health authority and GPs.
- ❖ Decide on a sensible outer boundary for the partnership, including those rural communities who should have a real interest in the future of the town.

Box 8 Widening the partnership to include several towns

- ❖ If the town's catchment as a shopping or other service centre clearly overlaps with other nearby towns, there is a good case for a wider partnership.
- ❖ Similarly, if there are other close links, through jobs, sports, health or education facilities, there is a good case for a wider partnership.
- ❖ If one or more nearby towns face the same problems, you may decide that a joint partnership offers advantages.
- ❖ Consult the town and parish councils, district and county councils, the rural community council and the regional development agency to see if there are other practical reasons for a joint partnership.
- ❖ Consult nearby towns' parish or town councils to see if they are interested in a joint partnership.

But note, an effective single town partnership will be better than a multi-town partnership whose interests or concerns are too different.



They did it – you can too

Guisborough

Guisborough, a historic market town of 18,000 people sits at the gateway to the North York Moors National Park. Prior to the Market Towns Initiative, the town had missed out on many funding opportunities that were helping to regenerate nearby communities, despite significant pockets of deprivation within the town and its hinterland.

Guisborough was selected as one of six towns across England to pilot the Countryside Agency's Market Towns healthcheck prior to its official launch in May 2001. The early days were not easy as the fledgling partnership followed an uncharted path with little paid support. Nonetheless, local people admirably rose to the challenge happily describing themselves as a group of 'enthusiastic amateurs'.

The healthcheck and action plan took around 15 months to complete, the process providing useful lessons that have since been shared with other towns. Since then, the partnership has weathered some difficult periods with the support of a very capable programme manager and several members who have supported the MTI process since the outset.

Press coverage, informative newsletters and a couple of successful open days have helped to attract new members particularly from the rural hinterland.

Project successes include streetscape improvements, an events programme, speciality markets, museum improvements, cycling initiatives and feasibility studies for two major environmental projects. A small grants scheme has proved particularly successful, supporting a range of projects, generating positive publicity and helping to generate community involvement. Looking ahead, the partnership is investigating the potential for a Business Improvement District (BID).

Of course challenges remain – notably the lack of resources and funding regimes that underestimate the time and level of professional support needed to build local capacity. The bureaucracy of funders, and the need to strengthen community ownership and participation represent a further challenge. Overall, however, the partnership can be justly proud of its achievements!

They did it – you can too

Networking by Market Town partnerships in Gloucestershire

The Gloucestershire Market Towns Forum is an independent network of representatives from the County's rural towns, parishes and community organisations. Twenty-two towns are involved. Established in 1995, the forum is core-funded through the South West Regional Development Agency, and the Gloucestershire Rural Community Council. It provides a networking forum that allows organisations to exchange ideas and support each other.

The forum has produced a 'community toolkit' providing guidance to communities about getting projects off the ground and sustaining them in the longer term. The forum, which has European, national and regional links also assists with:

- ❖ identifying and helping to secure external funding;
- ❖ providing key resources, equipment, skills and professional expertise;
- ❖ training in personal and committee skills.

2 Gaining community commitment

Purpose

- ❖ To make people in the town and surrounding countryside understand fully, take ownership of and become involved in the healthcheck.
- ❖ To map out the main issues of concern to the community.

The partnership needs to embrace the concerns of the community. These concerns will guide the way in which the healthcheck worksheets are answered and may form the priorities for the vision and action plan. Answering the worksheets will help confirm or challenge the issues.

2.1 Arranging a community event to establish the issues

One way to establish the issues is for the coordinator to arrange an evening or half-day event on behalf of the partnership. This should involve the whole community, including any interested organisations and the general public of the town and surrounding countryside. There are lots of ways of working to establish the issues and the best method will depend on the audience. A number of models for running a community event are given in the Community Participation Directory. If the partnership has not appointed a coordinator, it can select one or a number of its members to arrange the event. The partnership will need to pool resources in terms of administrative support, advertising, printing, and in providing a venue for the event.

The partnership should seek a facilitator with relevant experience and skills to help run the event. It is important that the facilitator is someone who is, and is seen to be, objective. There are a number of professional facilitators who could be employed directly by one or a group of partnerships. The district, unitary or rural community council may have in-house community development workers who could fulfil this role.

An event to establish the community's concerns also allows existing groups and projects to explain what they have been doing to a wider audience. The event can highlight specific concerns that should be given particular attention during the healthcheck. Long-standing issues and disagreements will inevitably be raised, but it is important to hold an event that draws people and organisations into the partnership and helps them to recognise the potential benefits of examining a wide range of topics in the healthcheck

2.2 Holding a community event

At the start of the event the **coordinator or chairman** of the steering group should:

- ❖ set out what the town can gain from doing a healthcheck and preparing an action plan, and also explain the main stages in the process;
- ❖ give a brief description of the town and surrounding rural area;
- ❖ discuss what initiatives are already under way.

The **independent facilitator** should:

- ❖ lead a discussion on the main problems and opportunities facing the area;
- ❖ sum up the areas of agreement and highlight the issues.

During the event the facilitator can open up the discussion to involve everyone in a 'brainstorming' session on what people's aspirations are for their community in the short, medium and long term. It can help to relate this discussion to a specific time in the future; for example: *What do you want this town to be like in ten or fifteen years' time?* and *What is standing in the way of success?*

The brainstorming session can either be done as an 'open floor' exercise or during smaller workshops where results are reported back to the whole meeting. The exercise should allow people to identify the strengths and

weaknesses of the town, and the opportunities and threats facing the town (a 'SWOT analysis'), and to voice their opinions on how they would like the town to evolve.

Workshops can also be arranged to tease out the main issues for the healthcheck and action plan. These workshops could be organised around the four main worksheet headings: environment, economy, social and community issues, transport and accessibility. The main findings of each workshop should be fed back to the whole community for agreement on what are the main issues for the action plan. The recorded outcomes of the event will assist in deciding the scope of the work to be undertaken on the healthcheck. The partnership may also wish to review whether it needs to bring in any new partners to cover new issues that have emerged during the event.



They did it – you can too

Penistone – a ‘charette’ in action

A ‘charette’ is an effective, highly interactive, community-based planning tool. By working through an impartial team of experts which listens to the views of the community, it has the unique advantage of giving both immediate feedback and ownership to all participants. Within an accelerated timeframe, a full range of issues, community concerns and alternatives can be researched and discussed.

In Penistone near Barnsley in South Yorkshire, six ‘experts in their field’ were invited to run a charette as part of the Countryside Agency and regional development agency’s support for the town through the Market Towns Initiative. The experts came from organisations such as the Countryside Agency and the Rural Community Council, and included a consultant with rural experience and a qualified planner.

The team worked in Penistone for three days. Its purpose was to provide the community with new ideas, reflections and insights on three key themes identified by the local community in preparation for carrying out a healthcheck and preparing an action plan. An intensive schedule, which included tours of the town and meetings with local groups, was drawn up.

The three key themes were:

- 1 What role does the rural hinterland of Penistone have to play in the future of the town? What are the issues facing agriculture and tourism in particular, and how can rural communities be effectively engaged in planning for the future development of Penistone as a service centre?
- 2 How can the young people of Penistone have their say in developing the town? What are the barriers to effective participation at present and how may they be overcome?
- 3 How can the town centre be made a more attractive and vibrant place for visitors and residents alike? What are the major structural issues currently restricting the town from being a vital centre for the western wards of Barnsley Borough?

The charette provided an opportunity for a team of people unfamiliar with the area to cast an educated, experienced eye over ‘old problems’, without ‘baggage’, and to draw upon their expertise to identify new ways forward. It reached out to many people in a short space of time and helped raise the profile of the town. The charette team produced a report of their visit which, along with the results of a local Planning for Real exercise, will feed into the healthcheck and action plan.

The experience in Penistone demonstrates that a charette team works best where it has:

- ❖ an agenda which allows its members to meet and talk with as many people as possible, while familiarising themselves with the town;
- ❖ an ability to change the agenda within reason as it sees fit;
- ❖ a dedicated local coordinating/steering committee to make local arrangements;
- ❖ time to think, reflect and discuss as a team what has been seen and heard;
- ❖ sufficient information in advance, sufficient team members and enough time to tackle the issues – it is recommended that prior planning of three months minimum will achieve the best results.

They did it – you can too

The Ramsey Area Partnership

From its inception the Ramsey Area Partnership has striven for inclusiveness. Its partnership board is made up of representatives from public, private, voluntary and community sectors. A visioning event held by the Civic Trust in 2002, highlighted the good work already under way, but also the need to establish a partnership reflective of the local communities, both in the town and the hinterland.

In 2003, the Ramsey Area Partnership was formed and decided to undertake a Market Towns healthcheck, using funding provided by the East of England Development Agency via Action for Market Towns. The partnership felt the healthcheck process would provide a framework by which Ramsey, and its dependent rural communities, could decide on how the area should be regenerated in the future for the positive benefit for all.

The partnership undertook a substantial programme to engage their communities in the process using a wide range of techniques including a forum event, a community questionnaire, a highly interactive campaign and a business survey.

The forum event brought together key individuals, groups and organisations who had helped bring the Ramsey Area Partnership together. Through workshops at this event the views of the partners were gathered. The questionnaire was designed to collect the views of a larger sample, to find out the reasons why people currently visited Ramsey, problems and improvements they would suggest, their use of amenities and ratings of the services available and also their accessibility.

The campaign called Make a Difference encouraged more active participation, with the emphasis placed on the involvement of young people to ensure this group was represented. Events included a junior school photograph project, poster design, graffiti board, discussion groups, youth council participation, a Girl Guides project and 'Big Brother' diary room event. In addition to the 200 young people who attended specific events, all 11–18 year olds at the two local schools were involved in some way.

3 Completing a healthcheck

Purpose

- ❖ To draw together a 'snapshot' of the town and surrounding countryside.
- ❖ To undertake the questions in the worksheets to help identify strengths and weaknesses.
- ❖ To draw together the results in a report, in preparation for creating a vision and drawing up an action plan.

The healthcheck consists of questions that cover those aspects that affect people's quality of life in a market town and surrounding countryside (the town's 'hinterland'). It starts with a factual 'snapshot' of the market town and continues with worksheets covering four main topic areas: environment; economy; social and community issues; and transport and accessibility. The snapshot and the worksheets can be downloaded from the website.

3.1 'Snapshot' of the town and surrounding countryside

The purpose of this exercise is to provide a 'snapshot' of the town and surrounding countryside which will help answer the questions in the worksheets. Factual information about existing services, facilities and so on will provide a background that can be balanced with the community's aspirations which emerge from the worksheets.

The coordinator should be able to collect and collate the basic information about the town and surrounding countryside from published information, reports and other studies

compiled by the district council and other organisations. The working groups may also play a part in gathering the information. Advice on existing information and data sources is given in the Data Sources and Survey Methods Directory.

Most of the facts are easily available, or can be collected, for individual market towns. They may be less easy to obtain for the rural hinterland or catchment area. The priority should be to collect them for the town itself.

3.2 Answering the worksheets

The worksheets have been designed to act as a practical checklist covering the topic areas of:

- ❖ the environment;
- ❖ the economy;
- ❖ social and community issues;
- ❖ transport and accessibility.

They are intended to be as objective as possible but will reflect the extent of community aspirations, concerns and priorities. Though presented as 'tasks', they are not meant to be prescriptive or onerous. They are merely guides to establishing objective and factual information about the area. It is perfectly acceptable to amend them or come up with additional questions that address local concerns. What is most important is that the evaluation of the worksheets will reflect people's aspirations, concerns and priorities. The results should be drawn together in a vision for the market town and surrounding countryside to form the basis for an action plan.

The steering group, aided by the coordinator, will need to decide who takes responsibility for answering the worksheets. The topic-based working groups would be recommended. Priorities and a timetable for the healthcheck will need to be agreed, based on the concerns identified at the community event. It is important to secure a broad and representative understanding of the issues and concerns of the community.

The district or unitary council, or a local group, may have recently carried out a community attitudes or shopping survey. These can give a representative picture of how people use the town and its facilities, and, perhaps more importantly, show their attitudes to existing problems and future opportunities. Take into account the implications of any special attributes of the town, for example, a coastal town.

3.3 The structure of the worksheets

The worksheets are given as individual sheets for each topic area. The sheets can be copied and used by individuals and groups in the community. Figure 6 on page 31 shows how the worksheets are structured. Each worksheet has:

- 1 a short definition of the task and an introduction to the task;
- 2 preliminary or 'fact-finding' questions. The questions are written into a table that has three columns headed:
 - ❖ **Starting points for information:** this lists some sources from which you might get information to answer each question.
 - ❖ **Information you will need:** this is where the questions are listed.

- ❖ **Answers and notes:** a blank column where the answers to the questions can be written.

- 3 concluding or analytical questions. The information you get by answering the preliminary questions will enable you to answer these 'So what ...?' questions. This section of the worksheet is where the implications of the answers to the preliminary questions get drawn out. It can also be used to help to start making connections between the conclusions from different worksheets.

The section is a table with three major headings:

- ❖ **You need to consider what the information you have gathered tells you.** In this column are questions on the key themes that the preliminary questions provide answers about. As themes from one worksheet are likely to be common to others, it will be possible to use these shared themes to draw conclusions from the whole set of worksheets.
- ❖ **Write your answers here. Base them on the information you have gathered.** This column is where a summary of the answers to the questions can be written in.
- ❖ **Conclusion.** This section is split into six sub-headings: It's a fact; Strength; Weakness; Opportunity; Threat; More info. needed. These columns only require ticking.

This technique will make it easy to complete a SWOT analysis based on the whole set of worksheets. It also flags up where the need to plug gaps in information can be written in to the action plan. Box 9 on page 32 gives more information about SWOT analysis.

Figure 6: The structure of the worksheets

WORKSHEET TITLE

Definition of the task in 1 or 2 short sentences.

1: Short introduction to the task

2: Getting the following information will ... (short text referring to the task)

Starting points for information	Information you will need	Answers and notes
<i>Sources for information</i>	<i>This is where the questions are listed</i>	<i>This is where you can write your answers to each question</i>

3: This part is called a SWOT analysis, where you identify Strengths, Weaknesses, Opportunities and Threats. Once you have the information, use the tickboxes in this table to show the Strengths and Weaknesses. Also flag up where there are Opportunities to improve things, or where there might be Threats in the future. The conclusions give the basis for a summary that can go forward to the Healthcheck Report.

You may need to tick more than one column for each question.

This technique will make it easy to complete a SWOT analysis based on the whole set of worksheets. It also flags up where the need to plug gaps in information can be written into the action plan.

You need to consider what the information you have gathered tells you in the light of these questions:	Write your answers here. Base them on the information you have gathered.	Conclusion					
		It's a fact	Strength	Weaknesses	Opportunity	Threat	Need more time
<i>Questions about the key themes of the worksheet</i>	<i>Where a summary of the answers to the questions can be written in</i>						

Box 9 SWOT Analysis

To help you answer the ‘So what...?’ questions, the final part of the worksheets is in the form of a table that enables you to undertake a simple SWOT analysis. A SWOT analysis identifies Strengths, Weaknesses, Opportunities and Threats.

Strengths are things about the town that are good, beneficial or exceptional. Weaknesses are things about the town that are considered poor, undeveloped or missing. Strengths and Weaknesses refer to the present and should refer just to the town and its hinterland.

Opportunities and Threats refer to the future. Opportunities means ‘opportunities to improve, get better, excel’, Threats means ‘things that could make the current situation worse, or prevent things getting better’. Opportunities and Threats need to be considered by reference to influences and developments that are external to the town and its hinterland. Often, of course, the town’s Strengths in the present provide the basis for exploiting Opportunities in the future. On the other hand, any Weaknesses in the present can become Threats to the future wellbeing of the town if you don’t act to counter the Weaknesses.

The SWOT table includes tickboxes to show the Strengths and Weaknesses of the town that are highlighted within the remit of each worksheet topic, and allows you to flag up where there are Opportunities to improve things or where there might be Threats in the future. The conclusions about the Strengths, Weaknesses, Opportunities and Threats give the basis for a summary that can go forward to the Healthcheck Report and Action Plan.

Basic information is likely to be available from published sources, reports and other studies. The district or unitary council may have already undertaken studies on one or more of the main issues, and may be able to provide assistance to working groups. In some instances, new surveys may be necessary. Advice on existing information and data sources, and on survey methods (ranging from traffic counts to townscape appraisals), is given in the Data Sources and Survey Methods Directory.

In summary, the process for getting answers to worksheet questions is:

- ❖ Establish what information is available: each worksheet has suggestions about where to look.
- ❖ Work out where there are gaps in the information you need.
- ❖ Find out what are the sources that could fill the information gaps.
- ❖ Agree who will have responsibility for completing the worksheets.
- ❖ Set a timetable for completing the worksheets.

The emphasis, however, is on the community’s aspirations for the town and its surrounding countryside. It is this which will help form the vision. It is essential that the questions from each of the four main sections are answered. The healthcheck is designed to join up economic, social and environmental matters. It should not focus on one issue at the expense of others.

It is also important that communities in the surrounding countryside have their say. Make sure that the surrounding countryside is considered in relation to each topic and question and consider establishing a separate working group to look at the links between the town and its rural hinterland.

3.4 Drawing the results together

The coordinator, or a small number of steering group members, will need to draw together the answers to the worksheets in a report.

The results of the healthcheck will include different types of information:

- ❖ Basic facts, for example changes in numbers of local jobs, and the availability and use of particular services.
- ❖ Information collected through organised surveys; for example, the condition of buildings.
- ❖ Qualitative information about the communities' attitudes and aspirations.
- ❖ Other interpretation and assessments by individual working groups.

The results should highlight problems or opportunities that should be acted upon. For example, the results of the work on housing may show that there is insufficient existing information and that a more detailed survey of future housing requirements needs to be undertaken. Alternatively, the analysis relating to education and training may indicate a need for locally-based information technology training so that residents can gain jobs in town.

There will inevitably be inconsistencies and differences of opinion. These may well be addressing related or overlapping issues, but taken from different perspectives. To give two obvious examples:

The town centre working group may conclude that free parking is critical to the future of local shops, while the transport group advocates stringent parking controls to ease congestion and traffic flow.

The recorded incidence of crime may be very low, but this rarely matches residents' fear of crime, which is particularly articulated through community appraisals. Both the actual statistics and residents' perceptions are legitimate issues which may need to be explored further in the action plan.

Differences of opinion will need to be explored and resolved as part of the process of completing the healthcheck. This can be done by:

- ❖ distributing a draft of the results to all members of the partnership and to individuals, requesting written responses expressing their views and other comments;
- ❖ holding an event at which all members of the partnership and invited members of the community attend. An independent facilitator will be able to work through conflicting issues, and the specialist advisors can provide advice on appropriate action which resolves inconsistencies and differences.

The results of the healthcheck should be written up in a report to provide:

- ❖ information from which to develop the vision and action plan;
- ❖ information for any future funding bid;
- ❖ a record of what has been found out;
- ❖ a basis for monitoring and comparing towns with other towns – a process called 'benchmarking'.

A suggested format for reporting the results is shown in Figure 7 on page 35. It is important that the report identifies who has been involved. You can do this under the headings of 'Partners' and 'Towns/communities'. There should be a record of what happened during the healthcheck under a heading such as 'Events/surveys undertaken'. Key statistics should also be highlighted somewhere in the report.

This format includes a 'healthcheck links structure' matrix that enables you to cross-reference any issues that relate principally to one topic area to the other three topic areas. The cross-referencing is important because you need to know about possible knock-on effects for other topic areas, and you will need to assess whether these are likely to be positive or negative effects. For example, seizing an opportunity to develop a brownfield site for new business start-up units would have negative consequences and therefore be a threat to environmental quality if the site is an important wildlife habitat.

By means of this matrix, you can start to see:

- ❖ where possible conflicts may arise between the priorities that the working groups identify for each of the four topic areas;
- ❖ what the issues are that could bring some disbenefits unless they are addressed sensitively in an action plan;
- ❖ what the issues are that cut across the separate topic areas and are therefore most likely to bring most all round benefit if they are addressed in an action plan.

The healthcheck report should be made widely available and preferably at no cost to the community. It should form the basis of establishing a vision for the town and surrounding countryside.



Figure 7: Healthcheck report format

Partners				
Towns/communities involved				
Events/surveys undertaken				
Key statistics about the town and hinterland				
Healthcheck SWOT				
	Strengths	Weaknesses	Opportunities	Threats
Environmental				
Economic				
Social and community				
Transport and accessibility				
Healthcheck links structure				
	Environmental	Economic	Social and community	Transport and accessibility
Environmental				
Economic				
Social and community				
Transport and accessibility				
Key findings and gaps in available information				

They did it – you can too

Regenerating Todmorden

When the community of Todmorden carried out a healthcheck of the town's strengths and weaknesses, residents were particularly concerned about the state of the town centre, which had many derelict buildings and numerous shabby 'green spaces'.

Furthermore, the town's busy market, which has drawn people in from surrounding rural areas for over 200 years, was in desperate need of renewal.

Some 30 regeneration projects are now being funded through the market towns initiative in Todmorden. These include demolishing and landscaping dilapidated buildings and converting some of the town's historic buildings for business and residential use.

The Initiative has breathed new life into the town and the local community are keen to do

everything possible to attract new investment and create employment opportunities. The Initiative has been the catalyst to make that happen with the first step to make the town a more attractive place in which to live and work.

An ambitious scheme to transform the town's market is also under way. £500,000 is being spent on new facilities, including stalls and public toilets. The refurbishment will help to ensure the market's continued success, and is being welcomed by traders, shoppers and all those who depend on Todmorden as a vibrant service centre for the surrounding area.

Work is also about to start on improving the town's railway station, creating a new entrance area and station façade, pedestrian walkways and better lighting. Funded through the Initiative, the £100,000 refurbishment will make the station a more attractive and safer place to use, increasing access for residents and encouraging local people to use sustainable transport.

4 Creating a vision

Purpose

- ❖ To work with the community to create a vision for the town and surrounding countryside based on the healthcheck.

The results of the healthcheck need to be evaluated to create a vision for the town and surrounding countryside. It is important to set out clearly what the community wants, based soundly on the knowledge obtained from the worksheets. The vision should be expressed clearly to describe what is needed and what will be done. From this vision, ideas will flow which will develop into an action plan that will be used to guide and plot progress.

4.1 Why the vision is important

A vision statement is a message of intent. The crew in Star Trek aspired to 'Boldly go ...'; Tina Turner wanted to be 'Simply the Best'; IBM wanted 'To provide the best service of any firm in the world'. If written in clear and unambiguous terms, which most people can understand, a market town's vision statement is the concept around which local support will be built.

The vision will show how to address the issues identified through community events and the other consultation and enquiry processes (such as the worksheets) that have helped develop aspirations for the future. Market towns must set themselves clear, powerful and understandable visions – that is, ones that are achievable, that can be measured and that are sustainable and open to developmental change. Box 10 gives a non-specific example of a vision for a market

town and Box 11 on page 38 summarises the importance of the vision to the healthcheck.

Box 10 A market town's vision

(example)

- ❖ We will provide a good quality of life for those who want to live, work and take leisure in the town.
- ❖ We will build a lively town, with sustainable communities and a mix of interesting and inviting opportunities for visitors.
- ❖ We will provide a thriving business environment and attract inward investment.
- ❖ We will make positive use of our proud heritage and buildings.

The programmes and projects of our action plan will flow from this vision.

4.2 Holding a community event to establish the vision

An event should be arranged by the coordinator on behalf of the steering group and with the help of an independent facilitator. The event should be run in a way which people of different abilities and backgrounds will find easy and enjoyable to take part in. It should aim to unite the partnership and encourage them to work towards the shared vision. The event will reflect the ambition of the partnership.

Box 11 Why creating a vision is essential

- ❖ A vision presents a vivid image for the community and partners of a sustainable and planned future.
- ❖ A vision can be embraced by the community and understood by partners – this is particularly important for partners who may also be funders.
- ❖ A vision is a clear and recognisable perception in the mind's eye.
- ❖ A vision sets out in a few words where the town wants to go.
- ❖ A vision will help to identify any key problems that the area may have.

The vision must indicate the direction towards a sustainable future; it does not want to be a quick fix that will not endure. Similarly, it may be necessary to revisit the vision from time to time.

When creating its vision, people in the market town should ask:

- ❖ How do we make the links between physical developments and the economic regeneration required to assist the town, and also the people in it who may otherwise be excluded?
- ❖ How do we link into the national and regional frameworks and policies, such as those that determine incoming investment?
- ❖ How do we link our short-term market town plans into longer-term government plans, such as Rural and Urban Renaissance?

Inconsistencies and differences of opinion may remain, but it will be important to share the vision with all the interested parties and to ensure that it accurately represents agreed aspirations, aims and objectives.

At the event, the following should be considered:

- ❖ Issues identified in the first community event including the links between issues identified both for the town and its surrounding countryside.
- ❖ The results of the healthcheck.
- ❖ The objectives and priorities of partnership members.
- ❖ The capabilities and resources available to and through the partnership.
- ❖ How agreement can be reached.

There is a positive role for all – professionals, specialists or the generally interested – to help to provide advice on action to deal with specific issues and to explore links between issues.

4.3 Reporting on the vision

The coordinator or another designated member of the partnership should draw together the vision as a written statement. The statement should be ambitious, but practical and realistic. Ideally the vision needs to inspire local people and those from other organisations.

The vision should set out strategic objectives. This is often necessary because success may depend on any number of economic, social and environmental factors. Expressing the

vision in terms of practical objectives will enable it to be understood by all involved. This in turn will make it easier to identify what needs to be done to achieve the vision.

It is important, therefore, to be realistic in establishing the objectives and priorities of the partnership according to the capabilities and resources that are available within the partnership. Some towns and cities have developed visions that are too ambiguous, using expressions such as ‘... become a dynamic and competitive location ...’ and ‘reputation for excellence will be focused on leisure, culture and the arts, retailing, housing and entrepreneurial activities ...’. Be wary, also, of terms such as ‘Objectives’, ‘Goals’ and ‘Targets’, which can come over as government-speak and alienate some communities.

A good way of reporting on the vision is to have a follow-up event at which key members of the partnership present a section of the vision. Smaller workshops will allow individuals to have their views on the vision as presented and on any amendments that should be integrated. A road show will engage the usually more excluded members of the community.

4.4 The visioning challenge

It can be easy for partnerships to become confused in the process of developing a vision. Individuals and organisations may have strong views of how the town should develop. Their views may be based on professional skills, experience or personal hobbyhorses. Whatever they are based on, such people’s visions may be appropriate and must not be lost, provided that the rest of the community has had the opportunity to have its say.

Aiming to set a vision based solely on the

facts revealed by the worksheets could produce a dull list of aspirations. It may not be sufficiently exciting to grasp the imagination of local people and partners.

Community Planning days may not be sufficient to gather local views in a coherent manner, or to give as many people as possible the opportunity to be included. In that case, a road show that visits schools, libraries, older persons’ accommodation, public houses and markets may be needed. The partnership should also work to ensure that there is widespread media coverage of the proposals.

Ambassadors for the partnership – members of the working groups, for example – should tour the town and gather local viewpoints and encourage participation.

Whatever the process by which the vision is created, it must:

- ❖ recognise that the area is affected by the past, by specific problems now, by the views of local people, and by what local assets and wider resources are available;
- ❖ target economic development, create jobs, guarantee training, and ensure that there is access to wider labour markets;
- ❖ seek to create links between all levels of government and attract resources to the town;
- ❖ strengthen communities and community organisations and bring residents to the centre of regeneration initiatives.

4.5 How the vision fits into the healthcheck process

As a result of the visioning process, a clear plan for the town can start to emerge in the form of a draft action plan with project proposals that will illustrate the viability of the vision. This plan is likely to include some small-scale changes (such as providing more litter bins), some methods of working together (for example, by competing in Britain in Bloom), as well as more significant programmes (such as attracting major employers), and identifying means of influencing key agencies (such as transport).

The local community will have had the opportunity to engage with the partnership and views will have been heard and integrated. The drawing up of programmes in

response to the vision and the subsequent projects will bring reality to the process. The 'quick wins' will gather more support from the community, and give a sense of achievability. The local media will be engaged in the regeneration process and will become eager to represent the good news stories.

The partnership will be able to test out its own dynamics as administrative systems become developed. The commitment of partners and funding agencies will be investigated and opportunity given for minor changes to the action plan to satisfy the needs of others. Partner agencies will start to identify the means by which they can work together to deliver a 'joined up' approach and how the partnership can bring 'added value' to mainstream services.



They did it – you can too

How Shipston on Stour achieved its vision:

The Stour Power Vision

No specific visioning day was held in Shipston on Stour. Opportunities were taken instead to gather views from a series of events held by the Stour Power Partnership. These included several themed workshops with key stakeholders, and individual presentations and discussions with key business and community leaders and groups.

These events were followed by an open community event to present the initial findings of the healthcheck. Views were sought on the key issues through informal discussion with partners, questionnaires were handed out and completed at the event, and an open forum known as the 'hall of fame' was set up where visitors were invited to submit comments on the display boards using sticky notes. The open community event was followed up by a

subsequent event to seek views on initial ideas for potential projects.

In addition to this, a web-based discussion forum was installed as part of the town's software. The forum generated more than 80 comments from individuals regarding the healthcheck.

While 'informing' is a key objective of the healthcheck process, facilitating 'opportunities to comment' around the development of the vision and the action plan was also vital to ensure that all 'stakeholders' buy into the process.

The name 'Stour Power', supported by the statement 'Shaping Tomorrow Together', was adopted by the steering group to be inclusive of the villages and hamlets in the rural hinterland, as well as the market town itself.

A strong image was created by a professional design agency and applied to all publicity material for the initial information, consultation and public participation exercises.

5 Preparing an action plan

Purpose

- ❖ To prepare an action plan to achieve the objectives agreed in the vision.
- ❖ To secure community support for the action plan.

The action plan demonstrates how the vision can be achieved. It may be used to:

- ❖ market the town;
- ❖ disseminate information to local people, organisations and visitors;
- ❖ attract funding and support;
- ❖ set out the aims, objectives and actions of the partnership;
- ❖ coordinate specific actions, and feed into other existing or proposed ventures;
- ❖ provide a detailed framework for monitoring and review by funding bodies ensuring that assistance is being targeted to meet the strategic objectives.

Some principles for preparing the plan are given in Box 12 on page 44.

5.1 Format of an action plan

The action plan may be drawn together by the coordinator on behalf of the partnership and its steering group. Different parts may be produced by the working groups. There is no 'correct' way to prepare an action plan. Each one will be different in terms of the problems, issues, aspirations and remedial measures relevant to a town and surrounding countryside. The advice set out here is not meant to be prescriptive. Rather, it is intended as a guide to elements that an

action plan could contain. The suggested components of an action plan are shown in Figure 8 on pages 44–45.

Equally, there is no standard way in which to structure an action plan. However, it should give information on the vision, objectives and action and be:

- ❖ clear and concise;
- ❖ easy to read and understand;
- ❖ widely available;
- ❖ illustrated and not overburdened with text;
- ❖ simple to update.

As the action plan may have to serve a number of purposes for a variety of audiences, it may be best to prepare a full document plus a brief summary. The full document should set out the vision, strategic objectives and project details, along with relevant data, in sufficient detail for funding bodies to review and monitor progress on a regular basis. The summary should give the main information and should be used for general distribution and promotion.

Overall, the action plan should set out who is responsible for taking action and the timescales for achieving these actions. Identifying targets provides a means of reviewing progress and determining whether objectives are being achieved.

A structure for listing actions is in Figure 9 on page 48. Preparing an action plan involves:

- ❖ taking the vision into account;
- ❖ identifying available resources;
- ❖ identifying priorities for action;
- ❖ monitoring and evaluation.

Figure 8: Suggested contents for an action plan

Box 12 Preparing the action plan

The action plan is the key tool in achieving the market town's vision which has been developed from the healthcheck. The following points should be taken into consideration.

- ❖ The process of preparing the action plan is as open and transparent as possible.
- ❖ Those involved should be proactive in seeking to involve as many local people and relevant organisations as possible.
- ❖ Meetings should all be open to the public, and the information generated be publicly available.
- ❖ You should make the fullest use of locally available expertise, facilities and support wherever possible.
- ❖ Be respectful (yet be pragmatic) to existing regeneration projects and initiatives in the area and how the action plan complements these.
- ❖ Make use of existing relevant studies and information wherever possible.
- ❖ Nurture the interest and vitality already present in the area and build upon it with a long-term perspective.
- ❖ The action plan should not be rigid; rather, it should be flexible enough to respond to changing requirements.
- ❖ Be innovative yet practical.
- ❖ Set out clear goals, objectives and steps or actions to achieve the vision.

Not every plan will look the same or contain the same information in the same level of detail but a good action plan will contain all or most of the following:

Description of the market town and its surrounding countryside

The action plan should contain a description of:

- ❖ the geographical area involved;
- ❖ the main characteristics and features of both the town and its surrounding countryside (these should be in the snapshot);
- ❖ details of existing projects and initiatives which contribute to the regeneration of the area.

The partnership

The action plan should identify:

- ❖ who 'owns' the plan, in other words did the partnership write the plan and does it represent the agreed views of communities in the town and surrounding countryside?
- ❖ the membership of the partnership, including the chair and steering group;
- ❖ working groups with their membership and remit;
- ❖ the general composition of the wider consultation group and how they were involved;
- ❖ how the partnership and working groups operate, e.g. accountabilities, remit, reporting and communication methods;
- ❖ details of the employing body for any staff;
- ❖ contact details for the main contact(s) in the partnership.

The healthcheck

The action plan should contain:

- ❖ reference to the healthcheck report in the main body of the plan, plus the report attached as an annex or details of where it can be obtained;
- ❖ details of how the healthcheck was carried out, including community participation, data gathering and how the vision was agreed.

The vision

The action plan should:

- ❖ describe the vision for the market town and its hinterland, e.g. as a SWOT analysis;
- ❖ set out long-, medium- and short-term aims;
- ❖ endorse the vision as a coherent and guiding feature of the plan.

Aims and objectives

The action plan should clearly state what the partnership will do to achieve the vision including:

- ❖ how the partnership will identify local challenges, needs and problems;
- ❖ how the aims of the partnership link in with other strategic statements and policy documents for the local and regional area, e.g. the local development plan and regional economic strategy.

Activities

The action plan should specify activities to deliver each objective. These activities should include:

- ❖ actions or tasks;
- ❖ milestones, timescales and targets;
- ❖ outputs (i.e. what the physical or immediate result is) and outcomes (i.e. what effect this result will have). For example, improving the bus service between a village and the town is an output; making it easier for more people to visit the town to shop or access services such as banks and the post office is an outcome;
- ❖ estimated/accurate costs for each activity proposed;
- ❖ details of the lead body for each activity;
- ❖ sources of matching funds;
- ❖ priorities, especially in relation to existing or competing demands on local resources. The priorities should be assessed for the short, medium and long term.

One test of a good action plan is whether each of the proposed actions is SMART, where:

S means specific

M means measurable

A means achievable

R means realistic

T means timed – or time-limited.

All your actions should pass the SMART test.

Threats, risks and realism

The action plan should:

- ❖ think ahead to any factors that might threaten the delivery of the plan and suggest how these might be overcome.

Judging success

The action plan should be reviewed at appropriate intervals. Consider:

- ❖ who will ensure that the aims and objectives are achieved;
- ❖ how communities in the town and surrounding hinterland will consider whether the plan has successfully improved the quality of life;
- ❖ if there are towns nearby with which to compare progress;
- ❖ what plans are there for ongoing community involvement in the delivery of the plan;
- ❖ when the plan will be reviewed again.

5.2 Taking the vision into account

The action plan should start with the statement of the vision and strategic objectives. All actions and projects should relate to these needs.

5.3 Identifying available resources

There is a need to explore possible sources of funding. It will be important to examine:

- ❖ the resources available among the partners to help with the production and implementation of the action plan;
- ❖ the resources available from national, regional and local bodies;
- ❖ potential revitalisation projects;
- ❖ potential resources attainable through other means of fund-raising, or alternative sources of help in the form of equipment or specialist advice.

The town and surrounding countryside may also have resources that are not used to their fullest extent, or have opportunities to provide new resources. Examples include: vacant land or buildings; areas of high landscape or wildlife value which are currently little visited; business groups not used to full advantage; untapped potential in the form of voluntary groups; or unemployed and retired people with skills.

5.4 Identifying priorities for action

The partnership should decide on the main areas it intends to address through the action plan, for example physical or environmental quality, tourism, business, leisure, and, if appropriate, the geographical areas to target.

A programme of actions for each geographical area could be established. Such a programme should tie in with the overall strategic objectives.

Given that resources are unlikely to be sufficient to cover each issue or area in an equitable way, and that it will be important to address some earlier than others, the partnership should give each action a priority. It will be necessary to rank these priorities according to the extent to which each is required, how much each is supported by local people, and in terms of the resources available to achieve them. It may be necessary to focus on only two or three topics or geographical areas in the short term. Such decisions should receive the full support of the partnership.

The partnership should generate and review suggestions for projects that will deliver the overall vision and strategic objectives. These will be expressed as a series of actions and could include long-term activities as well as short- to medium-term measures that will contribute to meeting the overall aims. The actions may be 'bricks-and-mortar' projects or ones that relate to 'softer' ventures such as training.

Each project will need to be fully explored and developed into a viable proposition that relates to the strategic objectives in the vision. It is especially important to identify initiatives that offer the prospect of providing the partnership with some 'quick wins'. Each proposal should be clearly identified in terms of its nature, expected outputs, costs, who is responsible for implementation, and the timescale for completion.

The level of detail given in the action plan depends on local circumstances. The partnership may be asked to work up detailed bids or action plans for specific partners or

specific projects that are mentioned in the action plan. The action plan can be an umbrella document for these. However, a specific bid document or plan, such as a delivery plan for a regional development agency, does not replace a market town action plan.

It will be important to regularly monitor the impact and effectiveness of actions to determine the extent to which objectives are being met and to review the vision and action plan accordingly. This is addressed more fully in the next section.

Other programmes, plans and initiatives, which may have a positive relationship with the action plan, should be clearly identified and arrangements for coordination established to achieve common goals. How the action plan relates to other strategies and plans (for example, the development plan), needs to be clear and will save duplication of effort. The partnership should seek to sign up the organisations responsible for specific projects to the action plan.



Figure 9: Action plan structure

Topic	Action	Strategic objectives	Priority	Who's responsible	How	When	Target to be monitored	Progress
Environment								
	1							
	2							
	3							
	4 etc.							
Economic								
	1							
	2							
	3							
	4 etc.							
Social and Community								
	1							
	2							
	3							
	4 etc.							
Transport and Accessibility								
	1							
	2							
	3							
	4 etc.							

They did it – you can too

Whitby

Traditionally a fishing town, tourism is now Whitby's chief source of income and the town is an important holiday and day visitor destination for the region. Although tourism is a strong industry, jobs tend to be low paid and seasonal with those who work in the industry needing stable and reliable jobs.

When Whitby carried out its healthcheck, it became clear that the business of tourism was a must, but that emphasis should be placed on the quality of its tourism product. There is a need to educate business providers, and to encourage them to adopt environmentally friendly practices. Special events are needed to create geographical and seasonal spread as well as providing opportunities to involve the community in Whitby's tourism product, by drawing on their skills as musicians and artists.

The Whitby and District Regeneration Partnership has evolved out of the Market Towns Initiative and has established a good reputation among local people as an 'honest broker.'

The partnership is keen to take forward the Beacon Town sustainable tourism theme and to involve local people in this endeavour. It has established a sustainable tourism focus group and the town has now piloted new tourism guidance for market towns, which encourages towns to make the most of their tourism potential. Information gained through the pilot will be used to help make decisions in Whitby.

While this work is progressing, work has also started towards creating a sustainable tourism strategy for Whitby. As a first step the Countryside Agency funded a consultant to provide advice to Whitby and District Regeneration Partnership on how to apply the principles of sustainable tourism to tourism-related projects outlined in the town's action plan.

6 Putting the plan into action

Purpose

- ❖ To put the plan into action and achieve results.
- ❖ To monitor and evaluate progress.
- ❖ To review the vision and action plan.

The market town partnership may now wish to appoint a project manager to make sure that actions identified in the plan are carried out. The order of events involved with implementing the action plan is shown in Figure 10 on page 52. The partnership may also need to develop a new legal structure to carry out some of the planned actions. Partnership function and legal structures are discussed in more detail in Section 7.

6.1 Project management

The project manager works with and supports the partnership in developing and implementing the action plan. He/she will also keep the community informed of progress. The post will typically last for three years initially, so supporting the partnership in achieving sustainability, and planning an exit strategy at the end of the initial period, is an integral role for the project manager.

An effective project manager needs to:

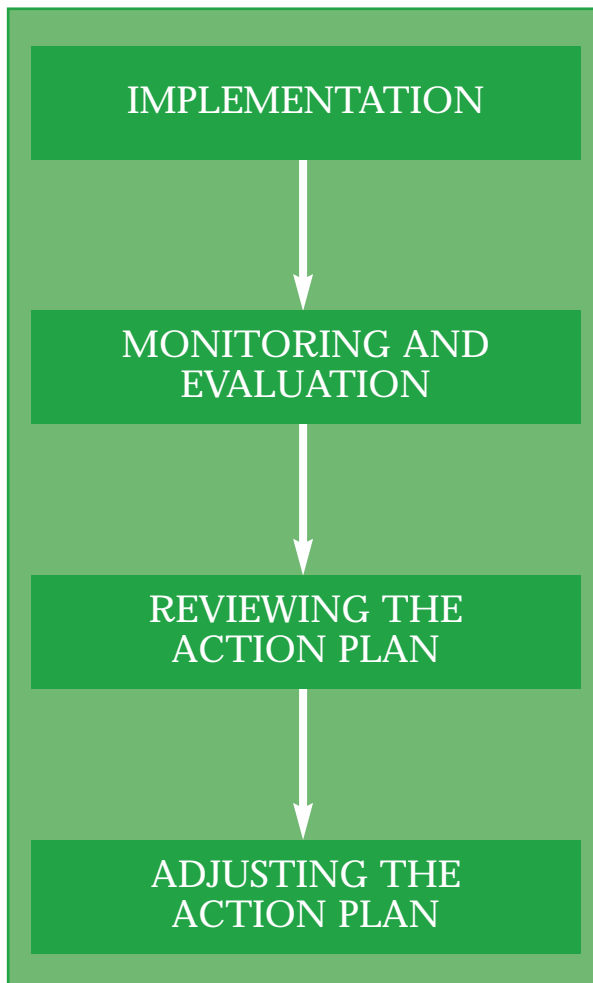
- ❖ have urban or community regeneration experience;
- ❖ understand public sector and business interests;
- ❖ have the ability to mobilise voluntary efforts;
- ❖ have financial and physical project management experience.

Box 13 on page 53 has more on the performance requirements for a typical project manager.

A minimum two to three year commitment is likely to be needed to achieve positive and sustainable results, but the partnership might also want to implement longer term projects. The need for a full- or part-time appointment will depend on the scope of the action plan and on the amount of community participation that has been developed during the healthcheck. The skills required are similar to, but more practically oriented than, those required for coordinating the healthcheck. Some coordinators will be able to carry the action plan forward as project manager, but any decision depends on an assessment of the skills and expertise of the individual concerned and the needs of the partnership. Support for a project manager could be available from regional development agencies in specific towns.



Figure 10: Implementing the action plan



6.2 Carrying out actions

One of the challenges lies in achieving and maintaining a sufficient level of enthusiasm and momentum to make things happen. Once the action plan has been prepared, it is important that any momentum gained is not lost during its implementation. The partnership or project manager should:

- ❖ set out a clear programme of action and keep to it;
- ❖ clearly identify the roles and responsibilities for those in the partnership;
- ❖ demonstrate the achievement of targets to the partnership, wider community and funding partners, so that a sense of

progress and accomplishment is maintained;

- ❖ draw on specialist assistance where necessary;
- ❖ seek new sources of funding wherever possible;
- ❖ be flexible, willing to adapt, and receptive to new ideas;
- ❖ be pragmatic about what is realistic, viable and achievable.

Some of the actions might require collaboration with other bodies. It is important for partnerships to maintain the good relationships that have been established during the healthcheck process. Where other agencies or organisations are responsible for delivering actions, the partnership may want to consider drawing up service level agreements to ensure the work is carried out as agreed and within defined timescales. A service level agreement is a voluntary device to commit partner agencies to the achievement of specific objectives. The agreement should include:

- ❖ an affirmation of the commitment;
- ❖ general statements of obligations;
- ❖ a definition of what will be provided;
- ❖ outcome targets and dates;
- ❖ sanctions to be applied if the targets are not met.

For some actions and projects it may be more appropriate to give members of the community responsibility for implementation. Task groups or the working groups who were involved in the healthcheck worksheets could be activated. It will be important to establish clear lines of communication and feedback on progress.

Box 13 What is needed from the project manager

The project manager works with people from a wide range of backgrounds, including those in senior positions and those who may be socially excluded. The post holder will need to be politically astute, be able to identify problems and pick up signals at an early stage, take action as necessary, and be able to drive projects forward without taking over.

Key performance requirements

1 Supervisory and managerial responsibility

- ❖ To lead the action plan projects, and supervise consultants and working groups as necessary.

2 Decision making

- ❖ To make day-to-day decisions on implementing the action plan within the overall framework of agreed priorities and work programmes.

3 Self management

- ❖ To be self-motivated and able to organise workloads to meet deadlines.

4 Creativity

- ❖ To think laterally and respond quickly to changing situations in order to find innovative ways of engaging with the community and securing their continuing commitment.

5 Education and experience

- ❖ To be educated to degree level and have experience of partnership working and at least three years' experience of project coordination in either the public or voluntary sector.

6.3 Monitoring and evaluating results

The partnership, steering group or project manager should consider in detail how and when monitoring is to be undertaken. Overall, monitoring will determine:

- ❖ the outputs from each project;
- ❖ whether targets are being achieved on time;
- ❖ whether the strategic objectives of the vision are being met.



Key performance indicators or targets should have been clearly identified and included in the action plan. When monitoring, partnerships should consider both quantitative and qualitative targets, which include:

- Activities
 - Actions carried out
 - Timescales for actions
- Outputs
 - Products or services that were delivered as a result of the actions
- Outcomes
 - Achievements as a result of the outputs
 - Changes as a result of the outputs
- Impact
 - Knock-on effects of the outcomes – positive and negative
 - Contribution to purpose, long-term strategic goals and objectives
- Lessons learned
 - Looking at what unplanned activities, outputs, outcomes or impacts occurred
 - Ascertaining why the actions are successful or not successful
 - Asking whether there will be continued positive impact.

Monitoring and evaluation will need to be undertaken regularly. Evaluation reports on the projects and key targets could be prepared on a yearly or half-yearly basis for distribution to the partnership and funding bodies.

Sometimes projects suffer from delays or attention and enthusiasm are diverted away from the plan. Regular monitoring and evaluation will help the partnership identify such problems at an early stage and take action to ensure the project is taken forward.

6.4 Publicise and celebrate your achievements

When a target in the action plan is completed, it's a good idea to tell people. Articles and photos for the press, displays in public spaces and newsletters to the community all help to keep the initiative alive and the community involved.

6.5 Reviewing the vision and action plan

The evaluation can be used to review the vision and update the action plan. To review the vision it may be necessary for the partnership or project manager to run a community event similar to that held to gain community commitment. At this, the vision should be considered in the light of the evaluation and adjusted accordingly.

In reviewing the action plan, projects that are not contributing adequately to the partnership's strategic objectives could be adapted or replaced with other initiatives. Any adjustments to the action plan which are necessary as a result of the monitoring, or as projects are completed, will need to be agreed by the partnership or its steering group. Those responsible can then seek to address other or additional issues through new projects. These refinements will help to introduce fresh ideas and keep the partnership from becoming stale.



They did it – you can too

Wolverton Unlimited

Wolverton was established in 1838 by the London and Birmingham Railway Company as the first railway town. It now sits adjacent to the major conurbation of Milton Keynes, which has been identified by the Government as a growth area. The proposal will result in the development of 70,000 new homes in Milton Keynes, with provision for 2,000 homes within Wolverton.

The healthcheck was carried out in 2002 and for six months over 500 people in Wolverton and the surrounding area discussed how their town should develop in the next 20 years. Two local consultants who were able to draw on their existing knowledge of the town and local contacts to overcome the natural scepticism and consultation 'fatigue' carried out the process.

After the event, people in the town felt that the healthcheck had helped to build local

capacity and had managed to dovetail into existing processes rather than duplicate. Subsequently, Milton Keynes Borough Council funded an £80,000 development framework plan that brought external consultants to the town to develop an urban design and economic development framework based on the healthcheck action plan. The development framework plan is now being held up as an example of best practice.

The Government's proposals for new housing present both problems and opportunities for Wolverton. The new development will bring around 600 affordable homes to the town, but residents are concerned about where these might be situated and their style. Wolverton Unlimited, the partnership which developed as a result of the healthcheck, is now working to ensure that any new development is in keeping with these assets, with the town's existing character and 'sense of place'. This makes it a unique example of community engagement with a key role in assessing how to influence the strategic location of housing development.

They did it – you can too

Frodsham

Frodsham Forward

Frodsham Forward was established with funding from the Countryside Agency and Vale Royal Borough Council. The town undertook a market towns healthcheck to create a clear picture of the current economic, social and environmental situation in the town. Public consultation took place to identify the needs and ambitions of local people and to plan for the future. An action plan was developed to address local issues and bring aspirations to life.

Only nine months after approving its action plan, the partnership had successfully levered

in £2.4 million, including £1.6 million from the North West Development Agency, to fund a range of projects. The partnership attributes its fundraising success to the knowledge and experience of its project coordinator, who identified funding sources and applied and lobbied for funds.

The partnership has also been successful in identifying existing funding that was earmarked for the area and, where appropriate, ensuring that it was redirected to projects in the action plan. This has helped to secure small-scale, early win projects, which provide examples of issues in the action plan being implemented. Projects have included the refurbishment of Helsby Community Centre and Castle Park Arts Centre and sponsorship of various town events.

7 Sustaining the partnership

Purpose

- ❖ To review the structure, function, and performance of the partnership.
- ❖ To make sure the partnership continues to represent the main interests of people in the town and surrounding countryside.
- ❖ To plan for the ongoing success of the market town action plan.

If the market town's action plan and projects are to be successful over the longer term, then the partnership which was established at the beginning of the healthcheck process must continue to be representative of the community and function well. The partnership should have clear terms of reference (see Box 14 opposite) and follow the principles of successful partnership working outlined in Section 1. Box 4 on page 15 should now be revisited.

7.1 The need to review and move on

In any effective partnership, individuals should successfully cooperate and collaborate both between themselves and with external organisations and agencies. They also need to continue to coordinate the implementation of the action plan and the work of other community members.

As the healthcheck is completed and the town moves into the implementation phase, it is often found that the mix of individuals within the partnership is no longer representative. Some people drop out or lose interest; others may have a different agenda and may not fully support the town's vision or

objectives. Often 'new blood', ideas, skills or knowledge may be needed to successfully implement actions and projects (for example, accountancy skills for projects which involve substantial amounts of capital investment).

Box 14 Terms of reference for the partnership

The partnership should adopt terms of reference, which at a minimum should cover:

- ❖ the purpose of the partnership and its membership;
- ❖ who services the partnership by looking after agendas and minutes;
- ❖ how often meetings occur;
- ❖ topics or issues that should be covered in meetings;
- ❖ the powers of the partnership to make decisions;
- ❖ what resources it has;
- ❖ to whom the partnership reports.

7.2 Partnership function, influence and performance

A community partnership's function is to influence individuals and organisations to take action, to review and communicate the outcomes, and to build capacity to continue future action. All partnerships or teams of individuals working together for a common

purpose naturally go through different phases of group development. Thus, to enable a partnership to work effectively, the membership should periodically assess at which of the following stages it is functioning:

- 1 Forming** – As the partnership forms, individuals define the task and a common vision while creating opportunities for people to get to know each other better.
- 2 Frustration** – Groups often encounter a period of difficulty because things aren't getting done, people don't feel valued or are not fully involved, or the purpose becomes lost.
- 3 Functioning** – At this stage groups have usually agreed clear objectives, milestones and responsibilities. They also have clear procedures for getting things done and know how to measure their success.

- 4 Flying** – This stage of group dynamics happens when the group communicates well, anticipates future challenges, builds future capacity and ensures that the participants are still serving a purpose to deliver planned benefits.

Where a partnership does not feel it is performing well or is not making progress in meeting its objectives and targets, you should reconsider its structure and functions, and plan how to reach an effective level of performance. Box 15 below summarises the areas to be considered. For an in-depth analysis of function and effectiveness, partnerships should consider carrying out a full Stakeholder Analysis of the positive or negative impacts of the internal and external stakeholders, the importance of their impact on the success of the project, and how to improve interaction and expand influence.

Box 15 Assessing performance

A **Performance Assessment** should consider how effective the partnership is in terms of the following areas:

Governance and policy – including legal structure and terms of reference (see 7.2 and 7.3).

Resources – including investment and planning for the longer-term (see 7.4).

Promotion, marketing and celebration of success – particularly to keep the community informed and involved.

Systems and procedures – which enable progress to be monitored and issues identified (see Section 6).

Roles and accountability – including leadership, delegation and clarification of roles. Identify who participates and who does not. Are there any sources of discontent or dissent within the partnership? What is the impact of this?

Levels of communication and influence – identifying how well both formal and informal channels are used internally and externally. Consider who shapes or influences opinions and decisions both within the partnership and externally. Who have positions of authority or responsibility? What connections are there with groups who will benefit from the partnership's actions or with those that oppose them?

Having identified the strengths and weaknesses of its current membership, the partnership will need to consider how to address any gaps or shortfalls in effectiveness.

The size of the partnership is important and while the partnership should continue to be broad based, a membership of no more than 10–12 is generally considered to be appropriate for a steering group, executive committee or board. In determining the mixture of individuals to form such a core group within the partnership, it is important to identify the mixture of skills, knowledge and personalities that may be needed and recognise how decision making can be influenced by different points of view. Box 16 below gives more on some typical roles and characteristics of a balanced partnership.

7.3 Partnership legal form and organisational arrangements

At this stage of the healthcheck process, the partnership should consider which legal form will best serve its purpose. There are two types of legal form to consider:

- ❖ an **unincorporated** association, society or trust;
- ❖ an **incorporated** organisation.

Many partnerships begin as **unincorporated** organisations. These are usually cheap and easy to run. The unincorporated organisation can simply be a group of people who join together for a common purpose. These groups may well call themselves an

Box 16 Roles in a balanced partnership

Role in partnership	Characteristics
Chair/facilitator	Clarifies goals, promotes decision making, delegates well Is mature, confident and a good chairperson
Worker/doer	Turns ideas into practical action Is disciplined, reliable, conservative and efficient
Shaper	Has the drive and courage to overcome obstacles Is challenging, dynamic and thrives on pressure
Eccentric/visionary	Solves difficult problems Is creative, imaginative and unorthodox
Researcher	Explores opportunities and develops contacts Is extrovert, enthusiastic and communicative
Monitor/evaluator	Judges accurately Is sober, strategic and discerning and sees all options
Team worker	Listens, builds, averts friction Is cooperative, mild, perceptive and diplomatic
Completer/finisher	Delivers on time Is painstakingly conscientious and anxious, and searches out errors and omissions

association – or a partnership, such as a market town partnership. However, associations and partnerships are not legal entities and cannot therefore enter into contracts with third parties: this must be done through the individual members who are then personally responsible and liable. Unincorporated status is often adopted when there are no employees and when there are no significant property interests. Unincorporated organisations should have a secure income and have no intention of taking financial risks.

Unless the group or body wishes to become a trust with charitable status, there are no requirements for registration with any regulatory body.

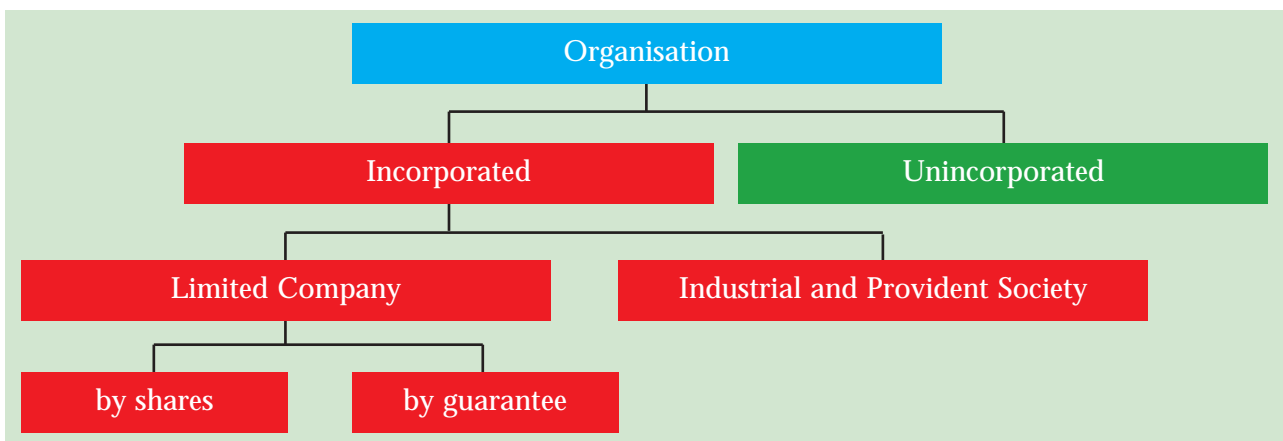
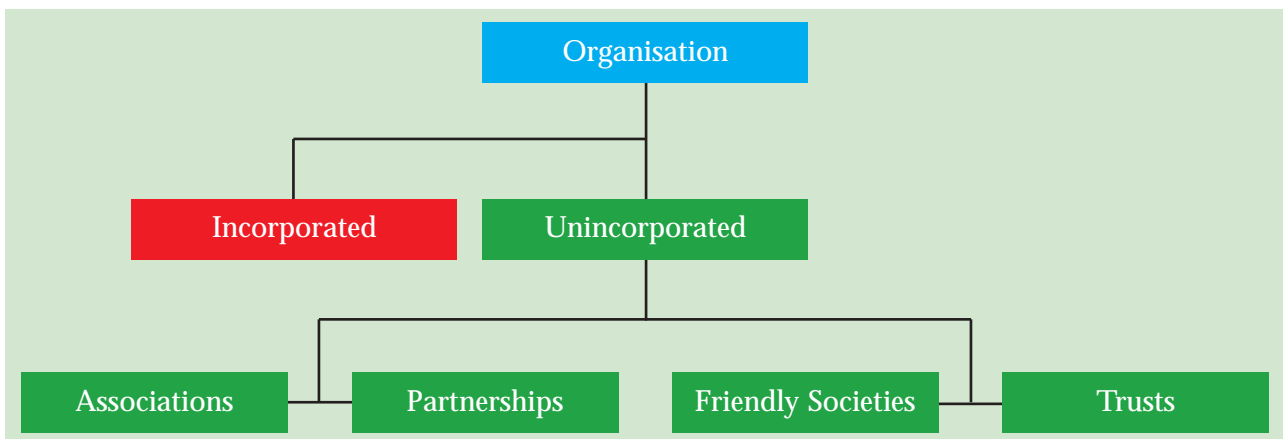
A partnership should consider becoming an incorporated organisation if it intends to enter into contracts, particularly where this involves:

- ❖ employment of staff;
- ❖ owning or leasing property;
- ❖ taking on financial commitments or investments.

Note that a contract is created for many everyday activities that a partnership might get involved in, such as hiring a minibus or a photocopier. In the case of unincorporated partnerships, it will be the individual members of the partnership who will be responsible for these contracts.

The main types of incorporated organisations are **Industrial and Provident Societies** and

Figure 11: Organisational legal forms



Limited Companies. Limited Liability Partnership and Community Interest Company status (see below) are also options for becoming an incorporated organisation.

An **Industrial and Provident Society** exists for the benefit of its members. All members have a vote and there need to be rules specifying how any surpluses or assets will be used. While partnerships may go down this route in order to establish a local community or social enterprise (such as a local exchange trading (LET) scheme), a development trust, a credit union or a community business, becoming a limited company is a more likely option.

Limited companies have a legal identity and can be established for either charitable or non-charitable purposes. They can take one of two forms, which are:

- ❖ limited by shares (with profits distributed to shareholders);
- ❖ limited by guarantee (where there is no distribution of profits: instead any surplus is used to further the company's purpose).

It is most usual for a voluntary organisation or a market town's partnership to be a company limited by guarantee where the company members own the company. Directors are responsible for running a company limited by guarantee and they are subject to company law. Charitable limited companies can be set up as 'for profit' trading subsidiaries.

Partnerships also can consider the option of becoming a **Community Interest Company (CIC)**. This is a new arrangement to allow social enterprises to use profits and assets for public rather than private benefit. Partnerships choosing this route will use business solutions to achieve public good but must commit to act in the community's interest in doing so. There is no single legal structure required of a CIC but the company

cannot be a CIC and a charitable trust at the same time. **Charitable Incorporated Organisations (CIO)** are yet another new form of legal status proposed in the Charities Bill 2004. The Bill will pass into law during 2005 and partnerships should update themselves on the legislation and regulations relating to CICs and CIOs.

Partnerships should consider the advantages and disadvantages of charitable status. A limited company can acquire charitable status if it can demonstrate that its purposes are exclusively designed to bring benefit to all or part of the communities at large, and not just to its members. All its purposes must be charitable. Under current legislation charitable purposes are those directed towards one or more of:

- ❖ relief of poverty;
- ❖ advancement of education;
- ❖ advancement of religion;
- ❖ other purposes beneficial to the community.

Clearly, the last of these is likely to provide the basis for an application for charitable status. But note that the provisions of the Charities Bill 2004 include a revision of the definition of charitable purpose. Partnerships are advised therefore to update themselves on changes that may come into law during 2005.

Charitable status is often used when there is a need to raise funds and to give exemptions from some taxes. A charitable trust must meet the requirements of the Charities Commission and have the capacity to administer itself properly. Charitable Trusts are allowed to make money from their activities, but these sums are treated as 'surpluses' to be used to further advance the charitable purposes, not as 'profits' that can be distributed.

Figure 12 below summarises the main features of the different forms of legal status. In considering the most suitable status, a partnership should consider its overall vision and objectives. Members should decide

whom they want to benefit from the partnership's activities, particularly if they wish to establish a community or social enterprise, and whom they want to allow to influence or regulate future activities.

Figure 12: Legal status summary features

	Legal Status						
	Incorporated			Unincorporated			
Pros and Cons	Industrial & Provident Society	Ltd Company	Unincorporated Association	Charitable Trust	Friendly Society	Not Charity	Charity
Easy and cheap to set up			✓			✓	
Legal advice essential	✓	✓		✓			
Required to register	✓	✓			✓		✓
Can observe own rules			✓			✓	
Rules have to follow legal requirements	✓	✓			✓		✓
Constitution has to be approved	✓				✓		✓
Members have say in day-to-day decisions	✓					✓	
Paid staff can be on committee	✓	✓	✓			✓	
Body has separate legal identity	✓	✓					
Body can hold own property and money	✓	✓					
Property held by trustees			✓	✓	✓		
Limited liability for members and others	✓	✓					
Accounts need to be submitted	✓	✓			✓		✓
Taxes and rates advantages							✓
Help from charitable trusts							✓
No limit on political activity						✓	
No limit on trading						✓	
Can get charity benefits without registering	✓				✓		
Easy to wind up			✓	✓		✓	

Partnerships may find it necessary to consider taking professional legal advice before proceeding.

7.4 Generating income for long term viability

In the early stages of implementing market town action plans, partnerships may rely on external sources of public funding from national, regional or local regeneration initiatives. For the longer-term security of the partnership and market town activities, partnerships should consider reducing their reliance on short-term funding and explore opportunities for greater financial independence. Establishing a community or social enterprise is one method of achieving this.

In order to establish a successful enterprise the partnership should look for potential ideas for providing goods or services. Opportunities may have been identified through the healthcheck process, and the partnership should focus on:

- ❖ the needs of the community for services or products;
- ❖ identifying which of these needs and wants are not currently met;
- ❖ the unique or special features of the town;
- ❖ the skills or assets of people in the town.

At this stage, the partnership might want to hold a consultation event or creativity exercise to explore these ideas, focusing particular attention on:

- ❖ the attributes of the proposed idea, service or product;
- ❖ how the idea can be made more valuable;
- ❖ who will buy it or use it;

Box 17 Examples of community and social enterprises

- ❖ Recycling or waste reduction schemes
- ❖ Local shop, café or sandwich service
- ❖ Business or Community Advice
- ❖ Handy-person initiatives
- ❖ Care services
- ❖ Transport schemes
- ❖ Promotion of local skills, products, heritage or environment

- ❖ whether it will make money;
- ❖ whether the resources are available to set up and deliver the idea.

Successful community and social enterprises can thrive either by focusing on the niche service they supply or by focusing on the needs of the sector(s) of the community they provide for. Many partnerships that have gone down this route have established networks with other community or social enterprises, and over half have secured soft loans or grants to help them start up. A full feasibility study will be necessary, especially if grants or start-up funding are to be sought. Sources of funding for community enterprise include:

- ❖ Equity;
- ❖ Loans;
- ❖ Social/community investment funds;
- ❖ Grants;
- ❖ Tax credits;

- ❖ European structural funds;
- ❖ Single regeneration budget;
- ❖ Community development venture funds.

Partnerships should be aware of the hurdles to setting up a successful enterprise, particularly where they have little expertise in

accessing funds or lack management or business planning skills. The partnership will need to analyse regularly the performance of the enterprise while monitoring its overall progress towards meeting the market town's action plan objectives.

They did it – you can too

A Succession Strategy for Malton/Norton Partnership

The Malton/Norton Market Towns Partnership wanted to make sure that they could continue to serve local communities even after direct funding had come to an end.

The Partnership considered establishing itself as a Development Trust but decided that, for a single town with a limited number of projects, this was simply not sustainable financially or administratively. Instead they got together with three other towns in the Ryedale District of North Yorkshire to form the district-wide Development Trust called The Ryedale Economic Trust. This is a not-for-profit company limited by guarantee with board members from the private sector. The Trust was set up with the aim of appointing a

project officer to serve all four towns and make progress in delivering projects that meet economic aims, drawing on a wide range of public sector funds. It is the intention that the Trust take on significant developments such as setting up business start-up units or developing brownfield land as a business or industrial park.

The original Malton/Norton Market Towns Partnership maintains an advisory and consultative role: the partnership has a broad membership and plays a key part in representing local people, for example by commenting on the Local Development Framework and the Regional Spatial Strategy. By repositioning itself in this way, the partnership has developed from being a vehicle to deliver projects to acting in a more strategic and consultative role, thus ensuring greater likelihood that it will be sustainable in the longer term.

They did it – you can too

Keswick

One of the key achievements of the market town partnership in Keswick, Cumbria has been to act as a link between existing organisations and groups. The partnership officer has acted as a neutral link helping organisations to work together where there had previously been difficulties.

The town has now been able to move forward with a project to develop the museum, with the museum trust and Allerdale Borough Council working to recruit a project manager and commission a feasibility study for its future. In addition, the partnership officer has played an important role in directing businesses and community organisations to other sources of advice and funding, even when the partnership has not had a great deal of money itself.

The healthcheck also revealed that despite low unemployment there is widespread dissatisfaction with the relatively low wages and a jobs market that offers too few long-term prospects for those wishing to pursue a career. Keswick has been repeatedly overlooked by conventional approaches to regeneration; but the market towns initiative has inspired a local partnership to begin to tackle these challenges. As a consequence a group of local business people got together to develop a pioneering proposal to introduce the concept of Business Improvement Districts (BIDs) to a small rural town. The BID in Keswick will be geographically defined and all ratepayers in this area will be eligible to vote. If the vote is successful the local authority will be able to collect a supplementary levy on the business rate which will be wholly designated for the delivery of specific proposals which have been agreed.



Glossary of terms

Action plan

A practical plan for implementing the agreed objectives of the healthcheck. It will include a vision, objectives and a programme of specific projects usually over a two to three year time period. It should be updated annually.

Benchmarking

A method for comparing characteristics of a town with other market towns throughout the country. It is both a statistical comparison and an approach to looking in a qualitative way at comparable towns.

Coordinator

Person appointed to manage the healthcheck process. Their role is to provide liaison between the partnership and local community and provide administrative support.

Community event

An event organised by the coordinator or project manager on behalf of the market town partnership and its steering group, to engage the community of a market town and its surrounding countryside. Events are carried out to gain commitment to the healthcheck, to set a vision and to agree an action plan. Events may contain 'brainstorming' sessions to gather ideas and/or a series of workshops arranged around issues or topics.

Evaluation

Analysing the monitoring of progress against the action plan.

Facilitator

Person responsible for managing community involvement and running community events.

Healthcheck

The audit of the economy, environment, social and community assets and transport and accessibility of a market town and its surrounding countryside.

Healthcheck handbook

Practical guide to carrying out a market town healthcheck.

Hinterland/catchment area

Rural area surrounding a town that includes communities that 'use' a town for a number of reasons, for example where they go to work, where they go shopping or where they go to use services such as the library, bank, job centre, hospital, health clinic, school, etc.

Market town

Towns in rural areas with roughly between 2,000 to 20,000 population that have the history, or potential, of supporting and servicing its surrounding rural area.

Market town partnership

A partnership can be defined as a coalition of organisations and individuals who agree to work together for a common aim, or a compatible set of aims. Members of a partnership share resources and responsibilities and agree to work together in a cooperative and mutually supportive fashion to achieve partnership aims. Multi-town or area-based partnerships consist of people from more than one market town who share enough common issues to carry out joint healthchecks.

Monitoring

Checking the progress of the action plan at regular intervals. Leads to an evaluation.

Outputs

The effects of particular projects implemented through the action plan, for example installation of a certain number of CCTV cameras.

Participation

The process of involving the community in carrying out tasks such as the healthcheck. Good participation should be as inclusive as possible and should allow people to gain ownership of the process for themselves. It is more than consultation.

Performance indicators

Benchmarks to measure how the market town changes over time in response to specific programmes and initiatives.

Programme of actions

A programme of projects on a particular theme, for example transport, designed to achieve a particular strategic objective and stated in the action plan.

Project manager

Person appointed to implement action plan.

Quick win

A project identified in the action plan that can be implemented quickly.

Report

A written summary of the findings of the healthcheck.

Revitalisation

Improvements to the environmental, economic and social conditions of market towns and the surrounding countryside.

Single Regeneration Budget

The Single Regeneration Budget provides funding to support regeneration initiatives in England carried out by local partnerships.

Snapshot

Basic factual information about a market town and surrounding countryside prepared in advance of answering the worksheets.

Specialist advice

Members of a market town partnership with particular skills and expertise, or local and regional experts who work with the partnership. Provide advice on how to tackle the issues of concern to local communities that are identified from the healthcheck and on the feasibility of the vision and action plan.

Steering group

The core group of a market town partnership that directs the work of the coordinator and oversees the preparation of the healthcheck and action plan, led by an elected chairman.

Strategic objective

A statement for a particular aspect of revitalisation, for example environment or transport, which supports the vision.

Surrounding countryside

An area around a market town defined by the local community as being of importance to them.

SWOT

The process of identifying and analysing strengths, weaknesses, opportunities and threats.

Toolkit

The web-based guidance on market town revitalisation. Contains the market towns' healthcheck handbook and information on sources of advice and funding.

Vision

This establishes the overall aims of the market town partnership and the wider community to be achieved over a five to ten year period. It is expressed as strategic objectives.

Working groups

Members of the steering group and wider partnership, grouped around the topic headings in the worksheets, who help to answer the questions.

Worksheets

The main part of the healthcheck consisting of questions covering four main topic areas: environment, economy, social and community issues, transport and accessibility.

This document was originally produced by the Countryside Agency in May 2001. Over the last few years lessons have been learned by towns that have completed a healthcheck. These lessons have been incorporated in this revised document for the benefit of towns that are about to undertake a healthcheck or those that wish to revisit their completed healthchecks.

The Countryside Agency is changing as a result of Defra's Rural Strategy published in July 2004. From 1 April 2005 we will:

- ❖ establish a distinctive new body to act as a rural advocate, expert adviser and independent watchdog, with a particular focus on disadvantage;
- ❖ work with our partners, English Nature and the Rural Development Service, regionally and nationally, across our landscape, access and recreation remit. We will bring together our activities to improve services for customers, work effectively with partners and contribute to sustainable development as we move towards a new integrated agency to be formed following primary legislation;
- ❖ transfer most of our current socio-economic delivery functions to Regional Development Agencies (RDAs) and Defra for delivery through Government Offices. This includes the transfer of the Countryside Agency's regional market towns work to the RDAs.

We may be changing, but our skills, knowledge and enthusiasm will continue to benefit people in rural England.