# Inclusive Wellbeing Economies

# Test and Learn Workshop – Brief and Facilitator Notes

## Aims and objectives

The aim of this workshop would be ‘to explore principles of inclusive wellbeing economies (IWE)[[1]](#footnote-1) in a local context[[2]](#footnote-2) and enable stakeholders within that context to consider implementation of these principles at place.’

This aim will be achieved by: -

* Raising awareness of IWE principles amongst the range of stakeholders present in the workshop.
* Enabling discussion and reflection amongst stakeholders on the current position of the local area in relation to IWE principles.
* Enabling discussion amongst stakeholders in order to start building consensus (or reinforcing it) towards a local IWE vision and shared purpose.
* Enabling critical consideration of what the necessary next steps are in order to work towards the vision and achieve the shared purpose.

## Scope

**Where would this take place?**

The idea is that this workshop will be developed into an ‘off the shelf’ product that could be picked up and applied anywhere without the need for specialist facilitation.

However, there is the need to first pilot the model in a couple of local areas to provide proof of concept, with learning from this process incorporated into the final product. This will be pursued via the Yorkshire and Humber Association of Directors of Public Health (YHADPH), with the potential to run pilots in a couple of local authority areas in the Yorkshire & Humber area of England.

**Who would this be relevant to and who would attend?**

This would be within the power of the local area involved to define. There will need to be at least one anchor organisation with a convening role to lead the exercise. They would then need to work in collaboration within their local systems to define who should attend. Anyone who has a role in relation to health or the local economy would be well-suited to attend and to add value to the exercise. This could include (not an exhaustive list): -

* local authorities (incl. public health, economic development, business and skills, and other teams linked to wider determinants, e.g., housing, transport)
* combined authorities (where they have a role to promote health and wellbeing and/or economic development at a regional level)
* local health and social care bodies (incl. integrated care boards and primary care networks)
* health and social care provider organisations (especially where they are large enough to function as anchors)
* voluntary and community sector organisations (especially where they have a role around health or the local economy or where they act as an anchor)
* any other anchor organisations not covered by the above
* local businesses / employers (incl. both larger employers that may act as anchors and smaller local businesses and generative organisations[[3]](#footnote-3))

In order for the workshop to fulfil its potential for change and to ensure action is taken on identified next steps, attendees should include (but not be limited to) people at a senior decision-making level in respective organisations, including where possible local elected members.

**When would this take place?**

Local areas aiming to participate will need to be ready to collectively have discussions in relation to inclusive wellbeing economies. This might necessitate some level of work having gone on before this workshop and a certain level of maturity in terms of relationships at a local level, in order to get the best outcomes but, ultimately, it doesn’t matter where a local place is on their journey towards IWE and all that is required is a commitment to explore IWE at a local level.

For those areas that are still very early on in their journeys, the workshop will help them to jump-start their work and begin to forge connections and build consensus. For those areas that are further ahead in their journeys, the workshop will allow them to build on and consolidate what has already been achieved.

Should pilots take place in Yorkshire and the Humber, it is anticipated that these take place between May and July 2025, and by no later than August 2025.

**How would the workshop be carried out?** It is anticipated that the workshop will take between 2 – 3 hours in its entirety, with some pre-work for attendees.

Workshops could be held face to face or virtually depending on what is best suited to facilitate attendance and useful interaction between attendees. Whilst holding workshops virtually can be more inclusive in terms of allowing a wider range of people to attend, care should be taken in this scenario to elicit and ensure a rich range of discussions and insights, e.g., through the use of break-out rooms.

## Content and structure

Broadly speaking, the workshop will be broken into the below sections. All documents required for the workshop can be found at the below link.

<https://www.yhphnetwork.co.uk/links-and-resources/our-shared-ambitions-and-workstreams/inclusive-wellbeing-economies/putting-it-into-practice/>

**Pre-work (30 – 60 mins).**

This will includesome pre-reading on inclusive wellbeing economies so that attendees can familiarise themselves with some of the basic underlying theory and principles. This is essential so that attendees have the right level of knowledge and are in the right place to then contribute towards the workshop.

Attendees will be asked to complete modules 1 and 2 of the Wellbeing Economy Alliance’s Wellbeing Economy Policy Design Course (publicly available at <https://wellbeingeconomycourse.org/policy-course>). This will cover what wellbeing economies are and why we should be working towards them, and will take a maximum of 30 to 40 minutes to complete.

They will also be asked to read ‘How we built community wealth in Preston: achievements and lessons’ (available at <https://cles.org.uk/publications/how-we-built-community-wealth-in-preston-achievements-and-lessons/>) to give them a case study example of inclusive wellbeing economies in practice.

*Facilitator note:*

*You will need to do the pre-reading and work also so that you’re in the best place to help facilitate the session.*

**Introductions and context setting (5 – 15 mins).**

Lead in convening organisation to provide a very brief (no more than five minutes) introduction to the session from a place perspective.

All attendees then asked to very briefly introduce themselves, their role and how it relates to inclusive wellbeing economies before, again briefly, speaking the following check-in question: -

‘When was the last time you had the feeling “This is why I do this work” or “This is why I get up in the morning”? What led to that feeling?’

*Facilitator note:*

*This will be incredibly tight in terms of time, especially if you have the max number of people signed up. Allow for a little overlap if needed but do encourage people to be brief - this is just to establish the tone of the session.*

**Taught section (20 – 30 mins).**

Lead in convening organisation or external facilitator (where present) works through slides on inclusive wellbeing economies, to consolidate and expand on pre-reading. Opportunity for questions and brief discussion after the presentation.

*Facilitator note:*

*You will need to be familiar with these slides and ready to speak to them. Feel free to skim or cut slides for the purposes of timing - they will be sent out to attendees afterwards anyway. You may find it useful to access and familiarise yourself with some of the resources at the end of the slides prior to the session, especially anything available at* [*https://www.yhphnetwork.co.uk/links-and-resources/our-shared-ambitions-and-workstreams/inclusive-wellbeing-economies/*](https://www.yhphnetwork.co.uk/links-and-resources/our-shared-ambitions-and-workstreams/inclusive-wellbeing-economies/)*.*

**Self-assessment (40 – 50 mins).**

In small break-out groups, consider where the local area is in relation to IWE principles, using the maturity matrix (to be developed). This may involve everyone looking at every principle or may involve the workload being divided up, depending on how many people are present.

Everyone will then come back together collectively to share and discuss results, before coming to a consensus.

*Facilitator note:*

*Try to have a facilitator in each group if possible for this section. Your role here will be to guide people through the process rather than having any answers yourself. If there aren’t enough facilitators for one per group, move around the room from group to group, checking that people understand the task and that they are keeping to time. You may want to assign different groups to look at different parts of the maturity matrix or you could have everyone focusing on the whole matrix, depending on the size of the group - you will need to judge what’s best for the group you have.*

*When groups are feeding back, the focus will be to try and come to a consensus between groups in the time that you have available (especially where more than one group has looked at the same thing and may have given different scores). Give people the opportunity where possible to discuss and ask questions, whilst also managing time. If a consensus isn’t possible then go for the midpoint between scores for now. Collate the collectively agreed upon scores in a separate place, e.g., fresh copy of the template or a flipchart.*

**Developing a vision and shared purpose (40 – 50 mins).**

In small break-out groups, attendees will consider what aspirations are as a local place in terms of IWE, i.e., what do we collectively want to achieve and what does good look like? What needs to happen to achieve that vision? What needs to change and what does that change look like in the short, medium and long term? Come back together collectively to share and discuss, before coming to a consensus.

*Facilitator note:*

*Similar to the self-assessment section above, your role here will be to try and guide people through the process and then bring them to a consensus afterwards. You can use the prompts in the visioning handout to help guide discussion and get people thinking along the right lines.*

*Collate key points as people feedback on a flipchart so that everyone can see what has been collectively agreed upon. Ask people to confirm that they are happy with this and allow people to talk it through as needed. Even if you can’t reach complete consensus, this might be a starting point for them to build upon going forwards.*

**Action planning (20 – 25 mins).**

In small break out groups, attendees will consider the agreed vision and shared purpose and translate this into some tangible, actionable and realistic next steps that can be taken and which the group can collectively be held accountable against.

Following this, everyone will come back together to collectively share and discuss, before coming to a consensus and making a collective commitment to agreed next steps. This should include actions that will be taken, people responsible and agreed timescales, as well as an understanding of what structures, governance and support are needed to hold the group accountable to these and to keep momentum going on this work, e.g., a steering group that meets on a regular basis.

*Facilitator note:*

*As with the two sections above, your role here will be to try and guide people through the process and then bring them to a consensus afterwards. Actions ideally need to be SMART, i.e., specific, measurable, achievable, relevant and time-bound (although some may be a general starting point that can then be firmed up in the future). Try to sound out timescales for when the people in the room will come back together again after today so that momentum is preserved.*

*Get people to consider the Two Loops Model (as per handout) to guide their thinking, i.e., not just what needs to start but also what might need to stop and where effort may need to be repurposed.*

*It may be at this stage that the colleagues present agree that this is not something that has the energy or traction to progress at this point. If this is the consensus of all (or the majority) present then this should be respected, although you can leave the door open for future work when circumstances are more favourable.*

**Wrap-up (5 – 10 mins).**

A final opportunity for questions and reflections before wrapping up. Lead in convening organisation to provide closing thoughts and thank people for attending.

*Facilitator note:*

*This is just an opportunity for any final discussion and questions. The lead in the convening organisation should attempt to sum up at this point, thanking everyone for attending and reiterating next steps.*

## Evaluation and learning

Evaluation questions to be sent to all attendees, asking them to reflect on to what extent the material resonated, how the workshop could be improved and any key pieces of learning that they would like to share.

1. Inclusive wellbeing economies are defined as ‘more deliberate and socially purposeful economies – measured not just by how fast or aggressive they grow; but also, by how well wealth is created and shared across the whole population and place, and by the social and environmental outcomes they realise for people’. [↑](#footnote-ref-1)
2. The scope of ‘local context’ is intentionally left vague as there are many different permutations that this could take. Broadly though, it is anticipated that this will be most useful at a local government level, roughly equivalent to a UK local authority. [↑](#footnote-ref-2)
3. Generative organisations include worker-owned businesses, community organisations, charities, social enterprises, locally rooted SMEs, municipal enterprises, worker-owned co-operatives, mutuals and community businesses. [↑](#footnote-ref-3)