PHA Whole Systems Approach to Obesity Local Progress Reports

NI WSA Progress Tracker: PHIRST Connect recommendations

Green = PHIRST Connect adaptations

Note to user: This tool includes hyperlinks to a separate document authored by researchers from PHIRST Connect. It contains detailed recommendations that were produced as part of a process evaluation of the implementation of the WSA to obesity in NI.

This tracker captures progress and learning, not just step completion; WSA is iterative - expect to revisit earlier steps.

Please add more tips to phases and steps as PHA/sites see fit. This document is a template demonstrating how some PHIRST Connect recommendations could be actioned, if PHA/sites feel they are appropriate. Adaptation to fit the needs of PHA. EA sites and beyond is encouraged and expected.

Example WSA to Obesity Progress Report						
Phase & aim and estimated timeframe (With hyperlinks to associated recommendations)	**Key Steps and tips**	**Progress and actions (with NI owner assigned to complete actions)**	**Further information (add details of flexibility allowances agreed between PHA and EA site)**	**PHE Guide associated resources (including adapted resources)**	**Additional resources (e.g. things the site/PHA identify as required to facilitate implementation now or in future e.g. human resource, expertise, software etc.)**	**Notes/feedback and learning for new sites**
Pre-set up considerations **Associated recommendations:**	1. PHA to ensure readiness for implementation a. Outline resource & capacity needs b. Outline expectations, agree flexibility, communication and	NI Owner:	• See P. 29 of guidance for suggested human resource requirements and P. 37 for	NA	• Initial WSA training and devise ongoing training schedule (see examples below) • Admin support • PPI expertise/access and/or training or	

R2a, R2b, R2c, R2d, R3a, R3b, R4a, R5a, R5b, R5c, R5e, R5f, R6a, R6b, L1a, L1b, L3a, L3b, L3d L5a, L5b.	how to capture learning c. Outline & ensure access to key resources d. Connect to EA sites for advice (e.g. shared learning network) e. ID additional resource needs & problem solve f. Familiarisation with PHE guidance and resources 2. Create local communication plan & agree language 3. Create public/PLE engagement plan to allow engagement from Phase 1 4. Identify relevant stakeholders & how roles relate to WSA 5. Check and adapt PHE resources for NI regional & local contexts and stakeholders. 6. Consider seeking data profile report from PHA Health Intelligence team before Phase 2 to help obtain support in phase 1, step 1.		'Additional preparation'. • See P. 14 of guidance for benefits of a WSA that include community assets as well as Pp. 23-26 which outline systems behaviours and how they require involvement of local communities and P. 34 'Understanding communities' • See P. 25 of guidance for information on communication mechanisms		guidance for staff on PPI • WSA for obesity resource library/repository • Expertise in Arc GIS • Project management tools (this document) etc. • Regional communication strategy	

Phase 1 Set Up (approx. 3 months based on ideal estimates) Secures senior – level support and establishes the necessary governance and resource structure to implement the approach **Associated recommendations:** R5a, R5c, R6b, L1a, L1b.	1. Engage with senior leaders obtain their support Tips: • Seek existing slide decks from PHA to help explain the WSA to senior leaders and that outcomes will take a long time to develop. • Identify and share how senior roles relate/will benefit from the WSA, especially if not in health. • Cite involvement of ROPIG and PHA to demonstrate commitment/support. • Creating governance can be time-consuming and require expectation management.	NI Owner:	• Establish senior leaders buy in • Establish local partnerships • Embed within community planning • See P. 33 of guidance 'Making the case' and 'One-to-one meetings'	B: Summary of local authority key policy • Using resource B to map and summarise key policies		
	2. Set up a core working team to undertake the day-to-day operations and coordinate the approach	NI Owner:	• Establish local governance structures • Establish local leadership			**Local Governance Structures:** Seek to embed within

	Tips: • Time is needed to agree expectations and ways of working • In-person meetings help build team rapport. • Consider recruiting team members who have projects ending at the same time the WSA starts, to ensure capacity. • Recruit a cross-section of organisations and experience.		group and encourage them to build rapport and agree ways of working • Development of TORs and local structure schematic • See P. 21 of guidance for description of leadership qualities			Community Planning structure and plan **Local leadership group:** Start with CCP partners – Council CP, HSC Trust, PHA + other
	3. Establish resources to support the process Tips: • See list of additionally required resources in Pre-set-up.	NI Owner:	• Agree resources to support with the local leadership group			
	4. Secure the accountability, advice and support of Senior stakeholders Tips: • Seek support from regional	NI Owner:	• Seek to embed objectives and outcomes within community planning			

	groups/organisations who may have local representatives (e.g. Sport NI). • Engage with senior oversight groups regularly to enable timely sign-off of staff capacity, requirements and actions.		structures and community plan • **Workshop 1 (Local):** Invite local working group to a WSA to Obesity Knowledge & Understanding workshop – see "Belfast" workshop programme and report for further guidance • Agree roles and responsibilities between PHA and LG for workshop			
Phase 2 Building the local picture	1. Collate key information about obesity locally Tips: • Look for additional data from local	NI Owner:	• PHA Health Intelligence - Obesity area profile report – bespoke to each area	C: Example consequence presentation B: Summary of local authority key policy	• Phase 2 training • Presentation of mapped regional level policies associated with obesity (created by PHA PH registrar)	

(approx. 6 months based on ideal estimates) Builds a compelling narrative explaining why obesity matters locally and creates a shared understanding of how obesity is addressed at a local level **Associated recommendations:** R5a, R5c, R5f, R5g, R6b, L1a, L1b. L4b, L3d.	projects that could be of use to provide a better understanding of the local area.					
	2. Start to understand the local assets including community capacity and interest Tips: • Ensure local support for Arc GIS asset mapping software. • Keep workshop attendees up to date with progress between workshops. • Agree the roles of the local team and PHA in workshops. • Consider separate workshops for asset and action mapping to avoid stakeholder confusion. • Provide and encourage opportunities for stakeholder input in workshops.	NI Owner:	• Working with stakeholders compile a list of local assets and community capacity that can support Health & Wellbeing Outcomes • Use ARC GIS system to help with assets mapping • If possible ask Council to Geo Map the Council area and to provide an interactive map • See P. 41 of guidance for how communities can help map assets	A: Community engagement and asset mapping	• Local hazard data from Department of Finance. • Arc GIS asset map template and parameters.	Workshop 2 Local (Belfast): - Complete asset mapping exercise within Workshop using Appendix A as guidance

	3. Establish a comprehensive overview of current actions Tips: • Create centralised list to avoid cross-posting of resource D to stakeholders. • Provide status updates and reminders of concepts at the start of workshops to ground attendees in the work once again. • Agree the roles of the local team and PHA in workshops. • Provide and encourage opportunities for stakeholder input in workshops.	NI Owner:	• Link with PHA Health Intelligence to deliver a presentation on the WDH • Using Appendix A – identity the 226 local causes and actions on Obesity & how they link to the WDH • Delivery of a local WSA to obesity Action Mapping & Asset Mapping Workshop • Refer to the local Action Mapping Guidance document for further info • Resource D make sure to use the updated excel sheet and not the PHE version.	D: Action mapping tool (adapted online version for NI context with guidance for email circulation and Word version for use in workshops, available from PHA) E: Action mapping guide Appendix A		Workshop 2 Local (Belfast): - Introduce Action Mapping exercise within a Workshop using resource D, E & Appendix A -Action Mapping Option 1

			• Post workshop use online proforma to collect identified actions from stakeholders			
	4. Identify the departments, local organisations and individuals currently engaged in supporting work around obesity Tips: • Rephrase 'network analysis' to 'stakeholder mapping' to make the task feel less daunting to stakeholders.	NI Owner:	• See resource F for further information on network analysis exercise • Option to include network analysis within a workshop or online proforma (post workshop) • See "Guidance for External Support Phases 2 – 4" for further guidance	F: Network analysis tool – supporting guide G: Network analysis email template (but see additional resources column) H: Network analysis data collection template I: Network analysis data analysis template	• New PHA-approved network analysis (stakeholder mapping) email template to avoid GDPR violations	Workshop 3 Local: Present results of Action Mapping & introduce Asset Mapping Arc GIS Obesity Map Introduce network analysis process

Phase 3 Mapping the local system Brings stakeholders together to create a comprehensive map of the local system that is understood to cause obesity. Agreeing a shared vision. **Associated recommendations:** R5a, R5c, R6b, L1a, L1b.	1. Prepare for workshop 1: • Identify and engage wider stakeholders • Prepare presentation slides and add local information • Prepare facilitators to undertake system mapping Tip: • Ensure expertise is available to support systems mapping. • A dynamic systems mapper is not required for this phase.	NI Owner:	• See p46 of guide – option to develop one high level system map or separate smaller more localised maps • See table 7 p48 of guide to identify a list of relevant stakeholders to invite to workshop. • See P. 50 of guide for additional advice on facilitation.	J: Example workshop invitation K: Workshop 1 presentation L: Workshop 1 set up M: Facilitation tips N: Workshop 1 presentation notes O: Workshop 1 agenda	• Phase 3 training • PHA/BCC designed induction video for new stakeholders joining at phase 3	PHE Workshop 1
	2. Deliver workshop 1: system mapping	NI Owner:	• See table 8 P. 52 • Agree roles and responsibilities between PHA and LG for workshop.			
	3. Begin to develop a shared vision	NI Owner:	• See table 8 P. 53			

Phase 4 Action Stakeholders come together to prioritise areas to intervene in the local system and propose collaborative and aligned actions **Associated recommendations:** R5a, R5c, R6b, L1a, L1b.	1. Prepare for workshop 2: • Create a comprehensive local system map • Prepare presentation slides and add local information • Prepare facilitators to support action planning • Refine a draft shared vision	NI Owner:	• Invite a senior leader to attend workshop (P. 58) • See Pp. 56-58 and Resource Q for guidance on systems mapping • Produce an A4 summary overview of PHE workshop 1 to familiarise new attendees (P. 59)	P: Action scales model Q: Workshop 2 presentation notes R: Preparing for workshop 2 S: Workshop 2 presentation	• Phase 4 training	PHE Workshop 2
	2. Deliver workshop 2: action planning	NI Owner:	• Agree roles and responsibilities between PHA and LG for workshop	T: Workshop 2 agenda U: Action register V: Summary of workshop 2 activity		
	3. Develop a draft whole systems action plan	NI Owner:	• Use action scales model when developing actions.	P: Action scales model W: Developing draft whole systems action plan		

			• See (P. 75) for further guidance on action planning. • See (P. 62) PHE's "Promoting healthy weight in children, young people and families…." Can support the action planning process. • Draft action plan to be shared with wider stakeholders in phase 5 for review. • See (P. 62) for resources required for develop of action plan.	X: Action plan template (Word document) Y: Action plan template (Excel document)		
	4. Refine the shared vision	NI Owner:	• Refine the shared vision by reviewing the feedback received from			

			PHE workshop 2.			
Phase 5 Managing the system network Maintains momentum by developing the stakeholder network and an agreed action plan **Associated recommendations:** R5a, R5c, R6b, L1a, L1b.	1. Develop the structure of the system network	NI Owner:	• See (P. 67) for "Examples of system networks" • See (P. 68) for further guidance on managing a system network.	No associated resources	• Phase 5 training	
	2. Undertake the first system network meeting	NI Owner:	• See (P. 69) for guidance on conducting the 1st Network meeting. • Opportunity to identify other stakeholders • Consideration should be given to stakeholders or partner agencies who could deliver complementary actions. See (P. 69) for further guidance.	No associated resources		

	3. Present the finalised shared vision	NI Owner:	• Proposed shared vision to be presented at first system network meeting and reiterated at all network meetings. • Process must be co-owned by the network.	No associated resources		
	4. Agree the action plan	NI Owner:	• (P. 69) The first network meeting is dedicated to agreeing the action plan • Agree actions for delivery in the short, medium and long term and who will be responsible for them. • Present how the action plan makes use of community assets.	No associated resources		

Phase 6 Reflect and refresh Stakeholders critically reflect on the process of undertaking a whole systems approach and consider opportunities for strengthening the process **Associated recommendations:** R5a, R5c, R6b, L1a, L1b.	1. Monitor and evaluate actions	NI Owner:	• See (P. 72) Stakeholders involved in the system network will have responsibility for: - local delivery of individual actions – collective ownership of actions and the approach • Resource D can help stakeholders determine whether appropriate KPIs are being used. • KPIs & specific outcomes should only form part of the picture, how actions affect the functioning of the local	D: Action Mapping Tool	• Phase 6 training	The system network becomes operational during phase 6

			system also important.			
	2. Maintain momentum through regular meetings	NI Owner:				
	3. reflect and identify areas for strengthening	NI Owner:	• See (Pp. 74 – 78) for guidance on reflect & refresh • Consider how actions affect the functioning of the local system and how they align for collective effort.	Z: Stakeholder survey Appendix 4: Logic Model		
	4. Monitor progress of the whole systems approach and adapt to reflect how the system changes over time	NI Owner:	• See (Pp. 74 – 78) for guidance on reflect & refresh • Use actions scales model when monitoring progress of the systems change.	P: Action scales model		

Table 1: List of resources (linked throughout the guide) Public library - UKHSA national - Knowledge Hub (khub.net)	
Introduction and phases	Associated resources
Introduction	A: Community engagement and asset mapping
Phase 1	B: Summary of local authority key policy
Phase 2	C: Example consequence presentation D: Action mapping tool E: Action mapping guide F: Network analysis tool – supporting guide G: Network analysis email template H: Network analysis data collection template I: Network analysis data analysis template
Phase 3	J: Example workshop invitation K: Workshop 1 presentation L: Workshop 1 set up M: Facilitation tips N: Workshop 1 presentation notes O: Workshop 1 agenda
Phase 4	P: Action scales model Q: Workshop 2 presentation notes R: Preparing for workshop 2 S: Workshop 2 presentation T: Workshop 2 agenda U: Action register V: Summary of workshop 2 activity W: Developing draft whole systems action plan

	X: Action plan template (Word document) Y: Action plan template (Excel document)
Phase 5	No associated resource
Phase 6	Z: Stakeholder survey

Guidance for External Support Phases 2 – 4

Objective	Task	Who	Timeframes
Phase 2 Building the Local Picture			
Action Mapping	Establish a comprehensive overview of current actions	Public Health Trainee	
	Identify the departments, local organisations and individuals currently engaged in supporting work around obesity	Public Health Trainee	
	Conduct action mapping (figure 11, page 42 of PHE WSA Guide) – Option 2	Public Health Trainee	
	Quality assure action mapping process, identify any gaps and missed opportunities, making recommendations if needed	Provider	

Phase 3 Map the local system			
Workshop Planning	Identify the stakeholders	Leadership Group	
Workshop Delivery	Development of stakeholder engagement plan – (Workshop, focus groups, 1to1, Interviews, Mop up sessions)	Provider	
Stakeholder Engagement	Organisation of workshop	Provider	
Systems Mapping	Development of workshop plan	Provider	
	Qualitative engagement with stakeholders – focus groups and interviews	Provider	
	Analysis and reporting of stakeholder engagement	Provider	
Drafting a Shared Vision	Development of an engagement questions guide and framework – Provider	Provider	
	Delivery and facilitation of stakeholder engagement workshops mapping	Provider	
	Creation of a comprehensive map of the local system that is understood to cause obesity	Provider	
	Workshop Report	Provider	
	Expertise and software in systems mapping (Move to shortlisting criteria)	Provider	

	Development of a WSA to Obesity baseline system model and map – specific to AND but which could be adapted across other areas for a WSA to Obesity	Provider	
	Identifying themes within sub system	Provider	
	Production of causal diagrams	Provider	
	Production and reporting of systems data	Provider	
	Production of report detailing methodology used for systems mapping and action planning inline with PHE WSA guidance	Provider	
	Update action mapping (figure 11, page 42 of PHE WSA Guide)	Public Health Trainee	
	Quality assure action mapping, identify any gaps and missed opportunities, making recommendations if needed	provider	
	Draft the shared vision – Leadership Group	Leadership Group	Complete Phase 3 by end of August 24
Phase 4 Action			
Workshop 2 Planning	Organising action planning workshop	Provider	September to December
Refine local system	Prepare and deliver action planning workshop(s) – (Refer to PHE Guidance P28)	Provider	

Develop a WSA Action Plan	Production of workshop report	Provider	
Refine the Shared Vision	Refine the local system map	Provider	
	Development of a draft whole systems action plan	Provider	
	Refine the shared vision	Leadership Group	