



Mentor Allan

## BRIEFING PAPER



## PRACTICAL POINTERS



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## Practical pointers when designing a successful scheme to help sedentary people become physically active.

### Briefing Paper Introduction:

In order to communicate the learning arising from the Mentro Allan project, papers have been written to suit different audiences. Study papers have been prepared specifically for researchers reviewing findings across a number of themes, whereas briefing papers are aimed at local or national project/service managers and policy makers. Each briefing paper covers a different topic although there are many aspects that inter-relate. Finally, practitioner guides are being written for those working in the field, directly delivering projects or activities, and case studies are being prepared to bring to life some of the lessons learnt showing what has been successful, what has been tried, and how some of the challenges have been overcome.

### Background to Mentro Allan:

*Creating an active Wales is central to our One Wales ambition for a healthier future for all. It recognises that sport and physical activity are beneficial to health and that a partnership across the Welsh Assembly Government, Local Authorities, the NHS, the Third Sector and our communities is essential if we are to gain the benefits of an active and healthy Wales<sup>1</sup>.*

The Mentro Allan (MA) programme<sup>2</sup> is a five year Big Lottery funded project and is actively supported by a diverse network of local and national partners. Its distinctive features are its:

- Aim to motivate a diverse range of sedentary groups to become more active;
- Focus on physical activity in the outdoors environment;
- Use of action research to involve its participants in achieving behaviour change;
- Gathering of evidence of what does and doesn't work in practice.

### Key points of the paper:

This paper outlines emerging findings from the research on how partnerships, management and service delivery arrangements work best to support long term behaviour change. In particular it focuses on the practical aspects of management and the delivery of activity programmes that have been tried and tested across the MA projects. It is clear that different approaches can be successful, it is therefore essential that there is a long term plan in mind to guide the decision making of project staff as the activity programme is developed.

### The evidence on which these practical pointers are based

Over the past four years the MA programme has been supporting and monitoring 14 projects across Wales providing practical support to a range of sedentary groups (e.g. the over 50s, young single mothers, people with physical disabilities or with mental health problems, carers, young people, people from Black Minority and Ethnic communities). The initial challenge for each project was to identify potential participants in their locality with sedentary lifestyles who faced significant barriers to engagement in physical activities. By their nature such people are often 'hard-to-reach' and almost always 'hard-to-engage'.

The practical pointers in this paper have been distilled from the carefully recorded experiences of these projects as they first made contact with their target participants, began to understand their needs, gave them their first taste of physical activity, helped them establish a regular pattern of activity and then supported their transition towards sustainable active lifestyles independent of the projects. Following the initial training of the project coordinators in addressing behaviour change and participatory techniques, each project adopted an experimental approach, testing what seems to work through observation and active dialogue with participants, using action

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<sup>1</sup> Minister for Heritage and Minister for Health and Social Services: Creating an Active Wales December 2009

<sup>2</sup> Part of the Big Lottery's UK-wide Community Sports Initiative, although MA focuses on physical activity opportunities as well as sport

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research. Some things have worked better than others, so that successful practical strategies have gradually been honed through direct experience and feedback.

Both quantitative and qualitative information has been gathered on the different sedentary participants as they have progressed through the projects. With a few exceptions, overcoming the deep-seated practical and psychological barriers facing such participants seems to take time, and behaviour change is often gradual and quite fragile (especially in the early stages). Nonetheless significant change has been achieved, especially with people who have the most sedentary of lifestyles.

### Identifying and reaching people with sedentary lifestyles

Selection of the types of sedentary people to be targeted by each project was based on demographic and statistical profiles of the different project localities, prior to the initiation of the projects. Once this choice had been made, one of the key objectives was to build a partnership which would bring together organisations with complementary resources, including knowledge of and contact with the target group(s). In many cases, however, the breadth of targeting and dearth of bodies with direct contact and experience meant that a range of approaches had to be tested to make initial contact. Generally speaking, projects that agreed to focus on just one specific target group (e.g. young mothers, carers, people with mental health problems) and a well-defined community, rather than trying to reach many types of sedentary people over a wide area, found it easier to identify the organisations with which they needed to work, and consequently to develop the relationships that were to prove essential for collaboration.

*“...the project would work more efficiently and effectively if it was only targeting a specific geographical area or one target group. This would allow project staff to become specialised, either in relation to the location and knowing ‘what’s on’ in that local area and filling in the gaps, or by becoming specialised to one target group by knowing how best to interact with members of that group, running activities within their capability, and knowing individuals’ limits so that we can challenge participants effectively.”* MA project worker

Many of those involved in managing the projects tended to assume from the outset that performance would be judged on the speed with which resources were allocated and the numbers of participants that could be recorded as having received ‘help’ from the project. Despite these concerns about numbers and outputs, the challenges facing project staff in trying to reach and involve genuinely marginalised sedentary individuals imposed their own constraints and timescales. Because MA is a learning programme spread over four years, staff found they were able to take the time needed to try different approaches, to get to know the often complex situations facing people in their target group(s), and to identify and build working relationships with key people and organisations that are in effect ‘gate-keepers’ enabling contact to be made with the chosen target group(s).

Some projects tried to make direct contact with the sedentary people they wanted to support, without the help of intermediaries. In one case, on-street canvassing led to the formation of two informal groups prepared to attend some ‘taster sessions’. However experience has tended to show that this direct approach is less effective in achieving sustained physical activity in the outdoors than by working with established organisations and local groups and/or statutory referral systems that are already in contact with or exist to support people who fall into the ‘sedentary’ category. There are limitations to this approach in that dependence is placed in a third party’s ability to reach a genuinely sedentary population. Nonetheless many of these organisations, groups and systems have built credibility and confidence with sedentary people as trusted support providers over many years.

Virtually none of the ‘intermediary organisations’ through which the projects were able to reach their target group(s) had any previous experience of providing opportunities for physical activity; neither did they see this as a need or priority for their client groups. Project staff often had to overcome scepticism or inertia when they first raised the idea that opportunities could be designed to meet the needs and interests of client groups. Therefore persuading ‘gate-keepers’ to support even initial taster sessions became an important first step in the process of making contact with target groups. Although this approach confined initial contact to those already involved with statutory or third sector services, experience has shown that word-of-mouth enables people on the fringes of or beyond this contact to learn about MA activities and be brought into contact with them through friends and acquaintances.

## Designing and facilitating initial 'taster sessions'

By taking the time to get to know the needs and interests of their target sedentary group(s), and to build vital working relationships with 'intermediary bodies', project staff were better able to design initial taster sessions appropriately. Overcoming a person's initial reluctance to get involved in any kind of physical activity that has played little or no part in their lifestyle often requires the removal of significant practical and psychological barriers. This is a critical point at which longer term engagement can be secured or when people will back out. Handling this sensitively, providing encouragement and support, exploring and solving all the practical difficulties and allowing participants plenty of time to become familiar with the activity (even just walking in the local park) has proved vital.

Many issues need to be considered, such as the choice of day and time to fit around participants' commitments and constraints, the provision of (or access to) transport; the pros and cons of location from both a practical and a psychological perspective; access to shelter, public conveniences and places to change; the choice of appropriate activities and activity leaders; whether participants will need specialist supervisory support; the availability of equipment and relevant clothing, and the provision of food and refreshments. Careful planning and the sharing of responsibilities between partner organisations are usually prerequisites of a successful taster session.

Reference has already been made to the importance of recruiting the support of 'gate-keepers'. Beyond this initial contact stage it may be necessary to persuade a participant's support worker (e.g. in the case of a disabled person or someone with mental health problems or a young person) of the value of enabling the participant to become more physically active, and therefore of the proactive role the support worker needs to play to enable this to happen.

*"We have found without such support from support staff and community workers that the project struggles to engage participants and maintain their involvement."*

MA project worker

## The importance of socialising and overcoming isolation

One of the key insights arising from the MA programme has been the realisation that many people with sedentary lifestyles often find themselves socially isolated. Bringing them into contact with opportunities for physical activity also brings them into contact with other people who tend to share their experiences (e.g. carers, young mothers) and creates opportunities for talking and socialising. The evidence suggests that the perceived value and pleasure of socialising, especially on a regular basis, is a very strong motivator to people continuing their involvement in any organised physical activity.

Given this background experience of isolation, a person may also feel initially reluctant to socialise. Isolation can cause a loss of confidence and a lowering in one's sense of self-worth. When this is coupled with negative perceptions about one's ability to engage in an unfamiliar physical activity, the psychological barriers that need overcoming can be significant. Several MA project staff have described participants who attended sessions on many occasions as observers but took no part in the organised activity until they felt secure and accepted within the group, and had become more familiar with the activity and what it involved.

Such psychological barriers can be hidden or articulated in terms of the practical difficulties that participants say are preventing them from getting involved. Removing these practical barriers is only one step, but if both they and the psychological ones are overcome, participants can become very enthused and committed to the activity. The key pointer here is recognising the vital importance of the social side of activities, and designing this into the way that the activities are experienced.

This has particular relevance for the selection of appropriate activity leaders because they need to be primarily people-focused rather than activity-focused. They need to consider all aspects of the experience to ensure that participants feel comfortable and motivated, and that they have sufficient opportunity to socialise. There is a balance to be struck here between engagement in exercise and socialising, and the best solution is to seamlessly integrate the two aspects (which is what makes walking, cycling and other informal, low-tech activities so useful). If this is not possible, sufficient time and appropriate spaces need to be set aside to ensure social interaction and

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bonding can happen reasonably naturally. The formation of friendships and group identities have been shown to play a significant part in keeping participants involved and in fostering ownership and sustainability.

### User participation in the design process

A vital aspect of the MA programme has been the way participants from the different sedentary groups have been actively engaged in designing and improving the ways they have been helped to become more active. Although taster sessions and perhaps an initial block of activities had to be designed by project staff using the knowledge they had gained indirectly of their sedentary target group(s) needs and interests, early opportunities for reflection and feedback by participants were organised. These often took the form of celebratory events at the end of a block of activity when participants are encouraged in a social setting to reflect on their personal and group achievements. At a certain point responses to the following questions are recorded:

- what went well – what did you enjoy?
- what didn't go well – what didn't you enjoy?
- how can the experience be improved next time?
- what additional or further activities would you like to see happen?

As the responses become visible, participants are encouraged to discuss and influence the nature and basis on which the activities are provided for them in future. This 'participant-led' approach enables the services offered to be systematically improved to fit the needs and interests of the group. It is felt to have encouraged participants who might have dropped out to stay actively involved, and it has fostered a sense of ownership in the service that seems to improve the chances that either (a) participants or those that support them might take over full responsibility for delivering it in future, or (b) that participants might actively seek out other services that could enable them to maintain or increase their level of physical activity over the longer term. Evidence to support these contentions is still being gathered.

In most cases it has been found that participants respond well to these opportunities to feedback. As one project worker put it:

*"Our participants love to talk about their experiences of being involved with the project. One of the major benefits for the majority of our participants is the social interaction of taking part in outdoor activities. As a result we have run a number of trips involving a consultation event... we found the discussions as part of the evaluation were more in depth as people shared their experiences. These have all proven to be a huge success and have led to increased enjoyment by all groups."*

Highly interactive and participative techniques have been used to generate responses from participants and it has influenced the ways that activities are provided in order to overcome various problems that may have arisen, ensuring that as many participants as possible are helped to continue their involvement and thereby to maintain or increase their levels of physical activity.

### Selecting appropriate outdoor locations

Another valuable aspect of the participant feedback has been the selection of locations for activities. Many projects have chosen to use very local and accessible outdoor locations on the basis that most participants would be able to continue to use them after project support has ended. This has often made participants aware of local environmental resources they didn't previously know existed:

*"To carry out this course we used the local canal and cycle trails as the basis for our walks. Some members of the group had not realised where the canal was situated and where it ran to. By introducing them to this local green space they have started to use it more regularly."* MA project worker

In other cases, although participants have enjoyed using local green spaces, occasional trips further a field have helped to sustain their interest:

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*“We have found that these monthly trips keep participants interested and enthused, and some see them as a reward for their commitment to the project, which in turn motivates them to attend the local based sessions.”* MA project worker

Another popular concern that has been catered for is the need for accessible toilet facilities and for places to shelter and to change. Transport and suitable clothing has also been made available, especially for new participants, until they can make their own arrangements. These incentives, the socialising and the chance to do new and exciting things that many thought would be impossible for them have all acted as powerful incentives to sustained engagement.

### Recruiting and training volunteers

One way in which a gradual move towards greater self-sufficiency is being achieved is by recruiting and training volunteers. Many volunteers have emerged from amongst the participants themselves as well as their support workers. They have achieved a level of competence and confidence which encourages them to take on a voluntary role within the group, perhaps first as a helper to the leader, but then with appropriate training, as a leader themselves. Even projects that have not enjoyed great commitment from project partners have managed to establish patterns of activity that have a chance of being sustained through the training and support of volunteers. As one project worker explained:

*“Most groups are happy to continue in our absence as long as everything is set up and ready for them to use, for example, venue, activity provider and transport if required. Others however are unable to function without us taking a lead and motivating them to undertake activities... We are now trying to build a good base of trained volunteers who will be able to take over from project staff in this situation so that activities can continue when the project ends.”*

Recruiting, training and supporting volunteers takes time, and makes its own demands on resources. There is a wealth of good practice in the management of volunteers which can be drawn upon, and experience suggests that projects that plan this activity carefully will benefit from the investment. Projects have also shown how attractive marketing and promotion of activities can help strengthen volunteers' (and participants') desire to be associated with them, perhaps through a particular group identity. Newsletters and celebration events can also help keep people informed, enthused and in touch.

### Whether to build in-house expertise or rely on outside providers

A key issue many projects have encountered as their activities have developed has been whether to contract external activity providers or build in-house delivery capacity and expertise, since there appear to be merits in both approaches. Most projects tended to contract external providers during their first year or two. Where such providers existed they have allowed projects to trial different delivery arrangements and to settle on those that deliver the best outcomes for a reasonable cost. By contracting in this way projects have helped to strengthen the availability of local independent provision, and in at least one case a new private sector provider has come into existence. Whilst there is no guarantee this independent provision will survive beyond the MA programme, should attempts to raise the physical activity levels of sedentary groups become more widespread in future there could at least be a greater number of activity providers to support it.

A majority of the projects eventually decided to build internal expertise and capacity. For some this was essential because external provision was so weak or non-existent. Perhaps as important was the shortage of providers capable of, or willing to work with sedentary groups with specialised needs. Over a four year funding period it tended to make sense to invest in training project staff to do as much of the specialised delivery as possible. A number of projects consequently transferred funding that had originally been allocated to contracting external providers into the training and development of in-house staff and volunteers. Several lone project coordinators are now supported by part-time or full-time staff (or volunteers) responsible for delivering activities:

*“...the intention was for [our organisation's] staff to provide activity because it was an experimental project and they needed to learn. They had to be out there and hands on. Additional part-time staff*

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*are brought in to deliver more adventurous activity where our staff don't have the necessary qualifications, but this has been done through under spend. This adventurous activity is now very ad hoc because the project staff are capable of delivering 90% of the activity because it is sustainable."*  
A lead organisation representative

Should the choice be made to develop in-house expertise it is important to be aware of the support such staff will need because they may find that working in close, informal and supportive ways with sedentary groups who often have multiple needs is sometimes emotionally stressful. They will also need to be trained in listening techniques, emotional intelligence and in managing boundaries. Although the work is often very satisfying, there are pressures on staff doing this kind of work, and many MA project workers have found it invaluable to have the support of a central programme team and the opportunity to share their experiences with other project workers.

### Using both the indoors and outdoors for a year-round programme

Another key challenge was the need to establish a year-round programme of activities in order to sustain the involvement of participants during the winter months. Given MA's emphasis on using the natural outdoors environment there was initial reluctance to countenance the inclusion of indoor activities. However experience has illustrated the role that indoor facilities can occasionally play in sustaining an activity programme centred largely on the outdoors. As one project worker explained:

*"...a conscious management change was to deliver indoor activity as well as outdoor. This was to develop participants' self-esteem and confidence, and to provide continuity which was seen as essential in winter or bad weather... The ongoing contact with the participants was seen as an important part of making the project work with this target group."*

Whilst making occasional use of indoor settings, most project staff have been determined to keep the focus firmly on physical activity in the outdoors. They have often been surprised by the willingness of their participants to experience less than perfect weather conditions. They have found that provided people are properly attired, the activity is not too long, the social enjoyment of the outing is strong and there is somewhere to dry out and have a cup of tea at the end, many participants have attended activities throughout the year. For others, the chance to keep meeting up indoors and planning outdoor activities even when the weather is bad has kept them in touch with the project and helped sustain a certain level of physical activity.

### Who pays?

Another consideration has been the cost of providing activities which in some cases can be high (e.g. sailing, canoeing, rock climbing). As projects have tried to move activities towards sustainability they have tended to concentrate on activities that are relatively cheap to run and easier to sustain, perhaps through volunteers (e.g. walking – including Nordic Walking and buggy walking – cycling, Tai Chi). Cost has also been a factor in focusing activity increasingly on local, accessible green spaces, although occasional trips further a field have been used to sustain interest.

All the projects have arranged for activities to be free for new participants to begin with, and for some this is generally the rule. Some voluntary body lead organisations have begun, with some success, to search for new funding to keep activities running on this basis when MA funding runs out. However other projects have found that because the long term sustainability of increased physical activity by participants is such a central aim they have needed to introduce limited charges for activities in ways that will eventually allow them to reduce or end their funding. This is not easy because as one project worker explained:

*"By making activities free has allowed opportunities to be open to all target group members within the community, including those from a deprived background. This seems to be a huge incentive across all target groups... many could not afford to pay for the whole cost of a session... However this can also be a hindrance to the sustainability of the project. When participants get used to having something for free they then expect it always to be free and this can lead to a drop off of people if a cost is introduced."*

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Nevertheless some projects have found that once people are involved and enjoying an activity they may be willing to pay something towards its cost. Participants need to be informed of the need to introduce an affordable charge and the money raised can be used to help the group set up as a constituted body able to apply for third sector funding. Charging for the cost of activities is clearly a sensitive issue and whilst groups may be formed to take on the task of fundraising, it is likely that some of the participants less able to take on this role yet most in need of support will slip back to a sedentary lifestyle once the project has ended.

Many MA projects have learnt however that some very effective types of activity that help encourage sustained behaviour change are relatively cheap to provide. Over-generous funding can sometimes be counter-productive by fostering strategies that are unlikely to be sustainable. Keeping things simple, accessible and affordable is often a better approach.

### Lessons learnt:

- focusing on just one specific target group and a well-defined community will make it easier to identify the organisations with which to work and to develop the relationships essential for collaboration;
- take the time needed to get to know the often complex situations facing sedentary and to build working relationships with 'gate-keepers' who can enable contact to be made with chosen target group(s);
- work with established organisations and local groups and/or statutory referral systems that are already in contact with or exist to support people who fall into the 'sedentary' category because they have built up credibility and confidence with such people as trusted support providers over many years;
- it may be necessary to persuade a participant's support worker of the value of enabling the participant to become more physically active, and therefore of the proactive role the support worker needs to play to enable this to happen;
- many people with sedentary lifestyles can find themselves socially isolated so that involvement in physical activity also brings them into contact with other people who tend to share their experiences – this is valued and can act as a very strong motivator to people continuing their involvement;
- encouraging participants to discuss and influence the nature and basis on which they are being supported to become more physically active enables the services offered to be systematically improved to fit the needs and interests of the group, and it encourage participants who might otherwise drop out to stay actively involved;
- activity leaders need to be primarily people-focused rather than activity-focused, and they should consider all aspects of the experience to ensure that participants feel comfortable and motivated, and that they have sufficient opportunities to socialise;
- pay particular attention to the design of taster sessions and introductory activities because overcoming a person's initial reluctance to get involved in physical activities that have played little or no part in their lifestyle often requires the removal of significant practical and psychological barriers;
- keeping activities firmly focused on using of outdoor settings can be successful throughout the year provided people are properly attired, the activity is not too long, the social enjoyment of the outing is strong and there is somewhere to dry out and have a cup of tea at the end;

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- once people are involved and enjoying an activity they may be willing to pay something towards its cost, but experience has shown that some very effective types of activity that help encourage sustained behaviour change are relatively cheap to provide.
- recruiting, training and supporting volunteers from amongst the participants and their support workers is a good way of creating a sustainable activity group;
- contracting external activity providers can help strengthen the availability of local independent provision;
- should the choice be made to develop in-house expertise it is important to be aware of the support such staff will need because they may find that working in close, informal and supportive ways with sedentary groups who often have multiple needs is sometimes emotionally stressful;

## Conclusion: what is the paper telling project developers, funders and policy makers to do?

- Establish projects that focus on a specific audience in order to engage appropriate partners, relevant expertise and to be able to meet the needs of the participants.
- Consider the knowledge and skills required to work with the target audience in order to recruit the right staff, encourage involvement of volunteers and to select the activity providers.
- Decide on a long term sustainability strategy for service provision, in order to determine whether to invest in the training of staff to provide the services or to contribute to the development of a network of external providers.
- Be prepared to adapt the wider support programmes for the target audience in order to provide activities and services at appropriate times and venues as well as ensuring that conflicting priorities are minimised.
- Ensure that senior managers are engaged at all points of the project development to ensure that the long term potential is exploited.

## Future Research:

MA has now engaged with over 9,000 participants who have been given the opportunity to become active using the outdoors and natural environment. Feedback from participants on the benefits of being active outdoors – and the barriers they face – will continue to be gathered through the research. This will allow the programme to develop further and increase learning on how to encourage more sedentary people to access the outdoor environment in Wales to sustain a physically active lifestyle.

## Further information:

The MA website contains information about the National Partnership and all local projects as well as annual reports, research papers, practitioner guides, case studies and guidance notes issued to project staff.  
[www.mentoallan.co.uk](http://www.mentoallan.co.uk)