

Introduction

This methodology outlines the collective approach to undertaking the Assessment of Local Well-being (Assessment) across the Public Services Board (PSB) areas of Carmarthenshire and Ceredigion during 2026/27. It has been developed in partnership with the PSB member organisations across both counties. The purpose is to guide the PSBs through the delivery of their Assessment of Local Well-being in consultation with partners, stakeholders, and residents. It sets out the standardised approach that will be taken to conduct the data gathering, analysis, engagement and indicative assessment, along with the timescales for completion by March 2027.

At the same time, the Carmarthenshire and Ceredigion PSBs have taken the decision to formally merge, with this project running concurrently up to the inaugural meeting of the new Board in September 2026. Therefore, this Assessment will play an important role in establishing and embedding new working arrangements as well as meeting its primary aim of informing the development of the Local Well-being Plan and ongoing work around well-being.

Background

The Well-being of Future Generations (Wales) Act 2015 requires each PSB to prepare and publish an Assessment of the state of economic, social, environmental, and cultural well-being in its area no later than a year before it publishes its Local Well-being Plan. The Act identifies seven well-being goals which provide the vision and ambition for the Wales We Want for today and in the future, and recognises the importance of collaboration between bodies in achieving them.

The Assessment will provide the evidence-base to set the objectives in the next 5-year Local Well-being Plan. PSBs are required to set these objectives in a way that accords with the sustainable development principle, i.e., acting in a manner which seeks to “ensure the needs of the present are met without compromising the ability of future generations to meet their own needs.” In the context of the current expected timescales of local government elections the assessments must be published by April 2027. Figure 1 shows the Carmarthenshire and Ceredigion PSB’s planning cycle under the Well-being of Future Generations (Wales) Act 2015.

Figure 1. The Well-being of Future Generations (Wales) Act 2015 Planning Cycle



Our Approach

As the Carmarthenshire and Ceredigion PSBs are in the process of merging, they have agreed to adopt a joint methodology, joint engagement plan and will produce a joint assessment. This marks a departure from the previous two assessments in 2017 and 2022. The aim is to realise the benefits of partnership working, help alleviate capacity concerns and avoid duplicating work.

Public Services Boards are partnerships of public service agencies who work together to improve local services. They include the statutory members of the PSB and other organisations across the partnership. **All partners have a key role to play** by either guiding the overall delivery of the Assessment or nominated members being actively involved in the engagement or the writing.

The following set out the core principles of the Carmarthenshire and Ceredigion approach which were agreed by both PSB in February 2026:

- The local authorities of **Carmarthenshire and Ceredigion** will take the lead in producing the Assessment but supported by the involvement of PSB partners on the Writer’s Group and the Engagement Group.
- The **Writer’s Group** was established to coordinate the data collection, review and writing of the Assessment. Meanwhile, the **Engagement and Consultation Group** was set up to deliver an Engagement and Consultation Plan to coordinate the engagement campaign during the summer of 2026 and the consultation on the draft Assessment during winter 2026/27. The groups will comprise of relevant members from across the PSB’s partners to allow the sharing of information, resources, and best practice.
- The Carmarthenshire and Ceredigion PSB’s have agreed to adopt a streamlined version of the **Life Stages Model** with less granularity in its structure but greater focus in its indicative conclusions. The rationale is that this approach will make it easier to develop the next Local Well-being Plan which will also be a joint plan across both counties. The ‘life stages’ model highlights the differences and similarities in experiences of well-being throughout a person's life. There are five life stages - New Beginnings; Childhood; Youth; Working Age Adults; Older Adults (Figure 2). This approach corresponds to evidence that our personal well-being changes over time.

Figure 2. The Life Stages Approach Adopted by the Carmarthenshire and Ceredigion PSBs



- The **Community Areas** geography will be a combination of the 6 aggregated Upper Super Output Areas (USOAs) and Middle Super Output Areas (MSOAs) in Carmarthenshire and the 9 Middle Super Output Areas (MSOAs) in Ceredigion. This not only provides continuity but also ensures that most of the data will be available at this geography. The community areas are set out in Appendix 1.
- The Regional Partnership Board (RPB) is required to undertake a **Population Needs Assessment** under the Social Services and Well-being (Wales) Act 2014. Elements of the development stages of both the Assessment of Local Well-being and Population Needs Assessment are undertaken in parallel. Therefore, working arrangements have been established with the RPB to avoid duplication, improve capacity and use of resources, and identify aligned priorities. This group will meet every other month through the production of the Assessment. Data from the updated Population Needs Assessment is expected to be available in April 2026 and opportunities to collaborate on the engagement campaign are already being developed.
- Both Carmarthenshire and Ceredigion work across **regional boundaries**. In addition to being within the West Wales region, Carmarthenshire is also part of the Swansea Bay City Deal region while Ceredigion also works across the Mid-Wales region with Powys on initiatives such as the Mid-Wales Growth Deal. Contact will therefore be established with relevant neighbouring PSBs to reflect the work across these wider footprints in the Assessment. These will include the Swansea, Neath Port Talbot, Pembrokeshire and Powys Public Services Boards.
- The **timeline** for delivery of the Assessment is set out in Appendix 2. It outlines the key phases of the project over the twelve months leading up to publication in April 2027.
- In undertaking this well-being assessment, we have taken a mixed-methods approach. The **four key stages** to deliver the Assessment are set out in Figure 3 and described in the following section.

Figure 3. The Four Stages to delivering the Assessments of Local Well-being



1 Data Review (Situation Analysis)

The initial stage in the production of the Assessment is the data review, which is a comprehensive data gathering and analysis exercise of existing evidence. This step is undertaken in close partnership with PSB members and other relevant organisations and is often referred to as the ‘Situation Analysis’.

The aim of the data review is the analysis of cultural, social, economic and environmental well-being in an area, to build an understanding of the area’s context, its challenges and the opportunities that exist. Through this approach we will highlight areas that we need to prioritise in order to tackle the challenges that we face now and, in the future, to improve the longer-term well-being of each county. We will achieve this by identifying:

- The **strengths and assets** of our people and communities.
- The **challenges and opportunities** faced both now and in the future.

The assessments will be informed by a wide variety of data, national and local research, and feedback provided to us from partners, stakeholders and residents through engagement during the summer of 2026. To begin the data review stage, data analysts and researchers across the two counties will come together through the Writers’ Group with the overall aim of collating and analysing the evidence. PSBs will draw on the following range of sources available, either available nationally or through local sources:

- WLGA (formerly Data Cymru) Core Dataset and Data Catalogue.
- Statswales
- Office for National Statistics
- NOMIS
- Public Health Wales
- Regional Partnership Board’s Population Needs Assessment
- Wales Centre for Public Policy briefings.
- Welsh Government Future Trends Report.
- Natural Resources Wales Area Assessments.
- Audit Wales’ national and local reports.
- Local data from PSB partner organisations.
- Primary research through the Regional Well-being Engagement Campaign during the summer of 2026.

While the data review is likely to be largely **quantitative** in nature, such as utilising time-series data and spatial patterns, PSBs will also draw on **qualitative** evidence available through partners and local service providers. We will engage with PSB partners early in the process to identify local data and sources of evidence to inform the assessment, which is likely to be a broader mix of quantitative and qualitative data.

The Writer’s Group will come together to interpret and assess both the quantitative and qualitative findings to build a picture of well-being to inform the next Local Well-Being Plan. The evidence will allow us to identify and prioritise the issues that are most important locally and begin to examine how they can be addressed. This stage will enable the PSB to develop a summary of needs for the combined Carmarthenshire and Ceredigion area.

In particular, the Writers' Group will ensure that the assessment:

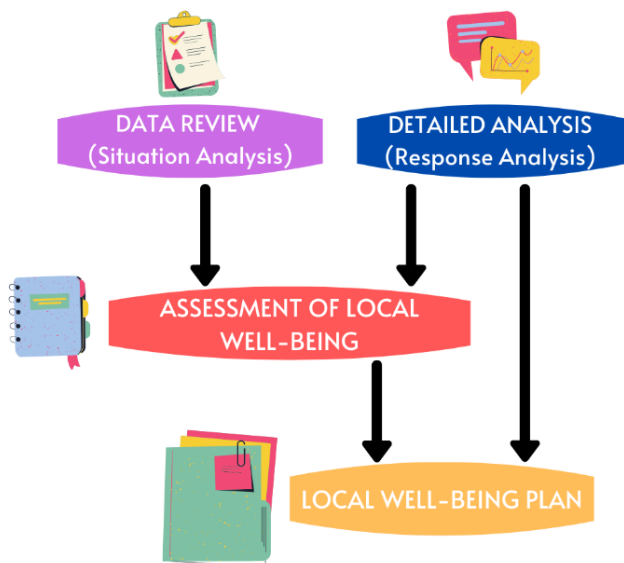
- Identifies communities that comprise the area(s).
- Assesses the state of Well-being individually (per community area).
- Assesses the state of Well-being collectively (PSB area).
- Includes future trends predictions.
- Demonstrates the links to the seven Well-Being Goals and Sustainable Development Principle of the Well-being of Future Generations Act.

2 Detailed Analysis (Response Analysis)

The Assessment will also include a more detailed form of analysis to develop explanations and explore causes of trends rather than describing patterns and trends. (This is also referred to as the 'Response Analysis').

The Response Analysis is a more detailed form of analysis which uses evidence in a more challenging and evaluative way to explore the factors which drive or cause the patterns and trends identified in the Situation Analysis. Subsequently, this will inform the selection of priorities for local areas by the PSB, which will in turn inform discussions around the content of the Local Well-being Plan. The role of the Situation and the Response Analysis is set out in Figure 4.

Figure 4. The role of the Data Review and Data Analysis in the Assessment of Local Well-being



3 Engagement and Consultation

Engagement is the key driver for the Assessment of Local Well-being, allowing us to record and consider views from a range of partners, stakeholders and residents to gain a truly reflective understanding of the needs of the PSB area.

Effectively involving people and communities is at the heart of improving well-being. They are the experts on their own local area; they know what works well and what is not working. The purpose of this stage is to gain a truly reflective and qualitative understanding of the needs of the area and to ascertain whether the information gathered during the situation analysis provides an accurate measure of well-being.

To that end, we will develop a detailed Engagement and Consultation Plan to provide a standardised approach to conducting the Regional Well-being Engagement Campaign and will have this in place at the beginning of the project in April 2026. A range of engagement techniques will be used to maximise audience reach and is accessible to all. These include, but are not limited to, surveys, stakeholder events and PSB sub-group workshops.

A well-being survey will be conducted, building on the knowledge acquired in the previous assessments. The Survey will be developed by the Engagement Group, comprising the engagement leads of Carmarthenshire and Ceredigion PSB's member organisations. The findings will be available at ward level to provide both a local perspective and an aggregated view of well-being across the two counties.

To ensure everyone has the opportunity to take part, the survey will be available in multiple formats including online, paper copy, and by phone on request. Other engagement methods, such as stakeholder events and PSB sub-group workshops, will be agreed regionally but delivered locally.

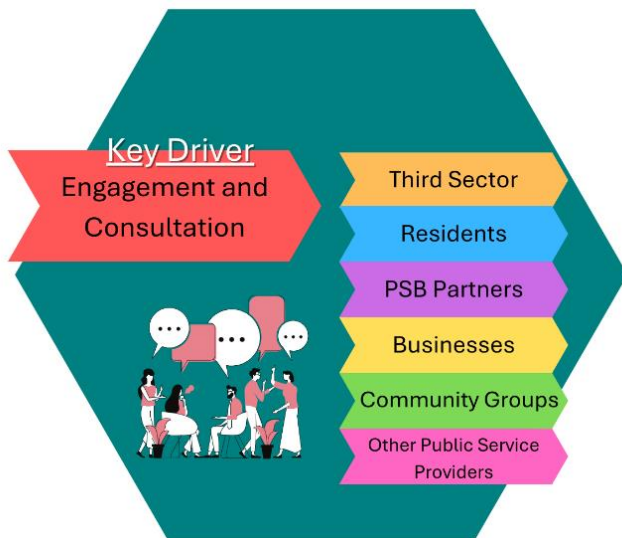
A wide range of people will be engaged with to reflect the diversity of communities and seek the views of those who could be hard to reach (Figure 5). These will include:

- Residents
- Businesses
- Community groups
- Town and Community Councils
- Third Sector organisations
- PSB partners
- Trade Unions
- Other public service providers

As part of the Engagement Plan a stakeholder mapping exercise will be undertaken locally to ascertain the groups that will be engaged with. The Engagement Campaign will run from 1st June to 8th August 2026, with an analysis of the findings presented to the inaugural meeting of the merged Carmarthenshire and Ceredigion PSB on 7th September 2026.

The PSB will also consult on the draft assessment with the same groups. The consultation process will ensure that any gaps are filled and that all groups are satisfied with the ways in which well-being is presented. The consultation will take place between November 2026 and January 2027, before the assessment is published and submitted to the statutory recipients.

Figure 5. Engagement and Consultation as the Key Driver



4 Final Assessment and Next Steps

The next and final element of the assessment process involves evaluating and analysing the findings of the research and engagement to develop a summary of the needs of each PSB area. (This is also referred to as the ‘Summative Analysis’).

Officers will come together to interpret and assess both the quantitative and qualitative findings to build a picture of well-being to inform the next Local Well-Being Plan. The evidence will allow us to identify and prioritise the issues that are most important locally and begin to examine how they can be addressed. The [PSB Futures Impact/Certainty Matrix](#) will be used to help produce the indicative assessment and Summative Analysis. This stage will enable the PSB to develop a summary of needs for the combined Carmarthenshire and Ceredigion area.

Following publication of the Assessments of Local Well-being, PSB’s will develop and publish their Local Well-being Plan within twelve months of the assessment.

All organisations involved in the production of the assessments will remain involved throughout the 5-year delivery cycle for the Well-being Plans through the identification of responsive actions, and their monitoring.

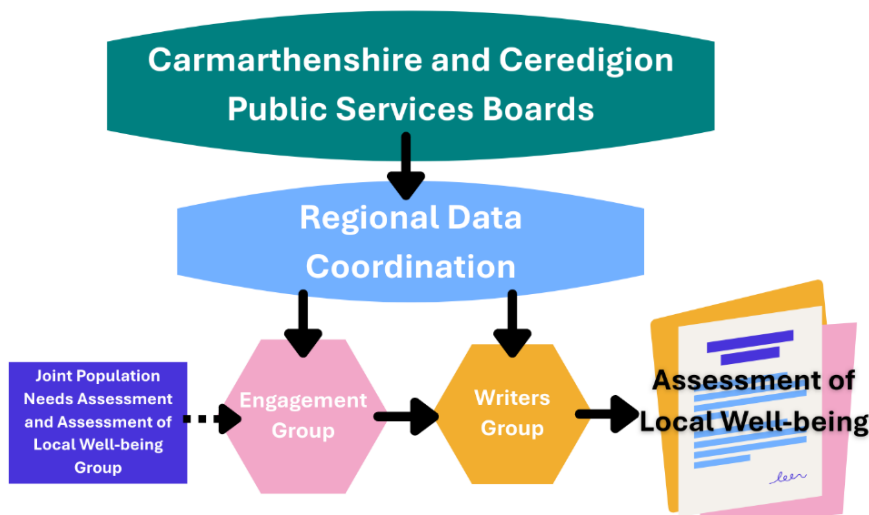
There are many exciting opportunities to ensure that the work on well-being between assessments remains “live” and available for all. One example is [Carmarthenshire County Council’s Data and Research website](#) that holds a variety of infographics, key headlines and deep dives into various aspects of well-being across the County. This aligns closely with the principles of the Well-being of Future Generations Act, as it will help to ensure that the assessment is ongoing and continually developing as and when new evidence becomes available.

Monitoring and Delivery

A timeline has been agreed which outlines the main deliverables of the assessment up to the publication date in April 2027 (Appendix 2). A corresponding action plan will also be developed, detailing what needs to be done, when it needs to be done by, who needs to be involved and the resources that will be required. The action plan will be reviewed and monitored monthly by the Writers' Group. The Writers Group is responsible for producing the Assessment and runs throughout the full length of the project.

The Carmarthenshire and Ceredigion Public Service Boards will be kept informed of progress via updates to PSB meetings which will take place at the more regular period of every other month during 2026. Updates will include any key decisions needed from the Board in order to progress the assessment.

Figure 6. The structure of working groups involved in producing the Assessment of Local Well-being



Risks, Issues and Limitations

It is recognised that there are challenges and risks to the joint assessment approach. The majority of PSBs across Wales produce individual Assessments of Local Well-being. The joint approach in Carmarthenshire and Ceredigion means 'breaking new ground' to find new ways of working in partnership, retaining the localised data that PSB have been used to, and delivering a manageable yet representative assessment across a much wider PSB area. The challenges and risks can be summarised as:

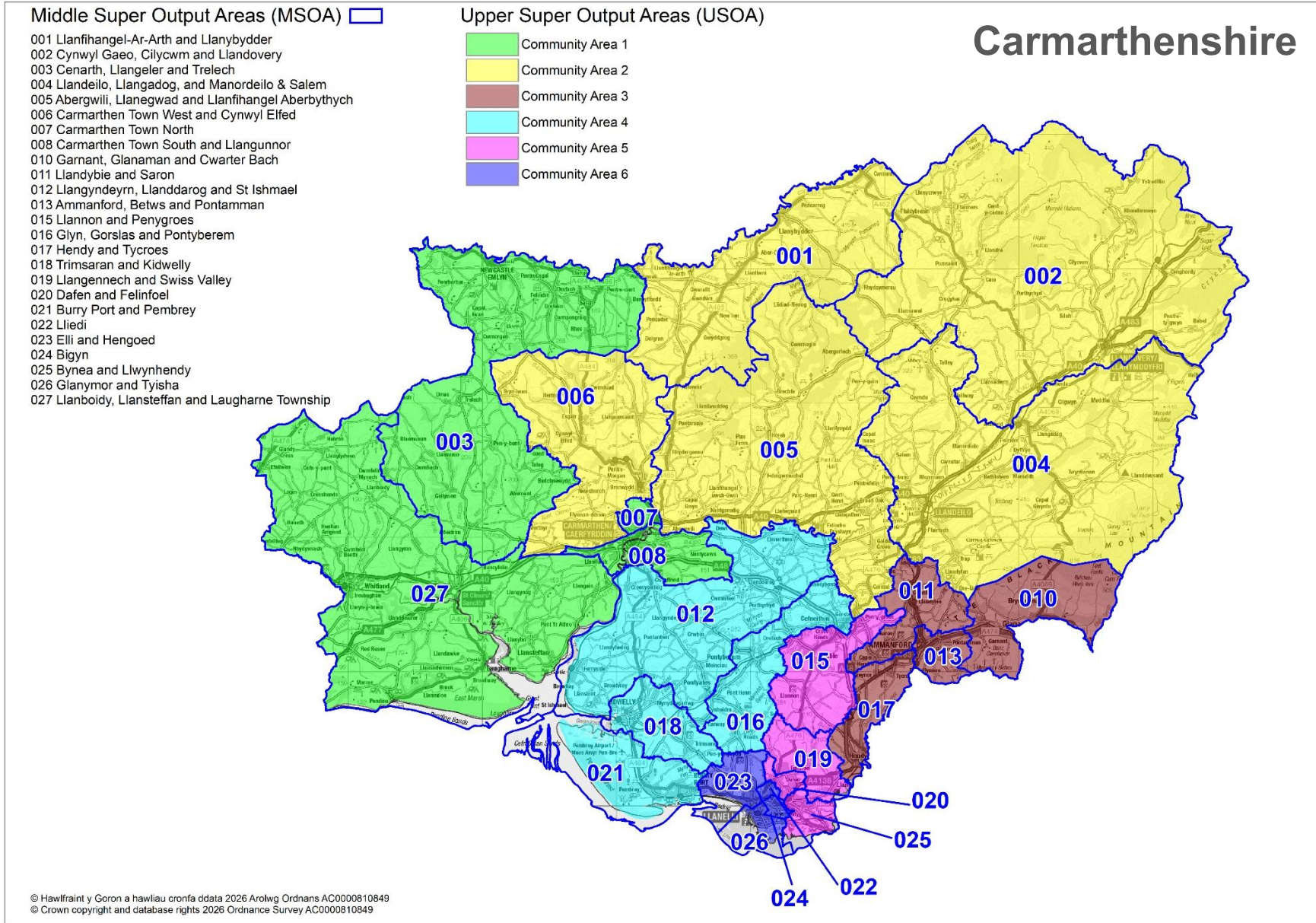
- Overcoming the **structural data bias** towards Carmarthenshire due to its significantly larger population (2.6 times greater than Ceredigion) and ensuring continuity in the **availability of local data**.
- Developing a **new methodology**, establishing **closer partnership arrangements** and **managing greater partnership involvement** to deliver the assessment.

- Producing a **manageable assessment** across a much larger PSB area.
- Producing a **streamlined assessment** with less granularity in its analysis but greater focus in its conclusions.
- Identifying ways to **keep the data 'live'** to support the ongoing work around well-being following the end of the Gorwel Digital Information System project.

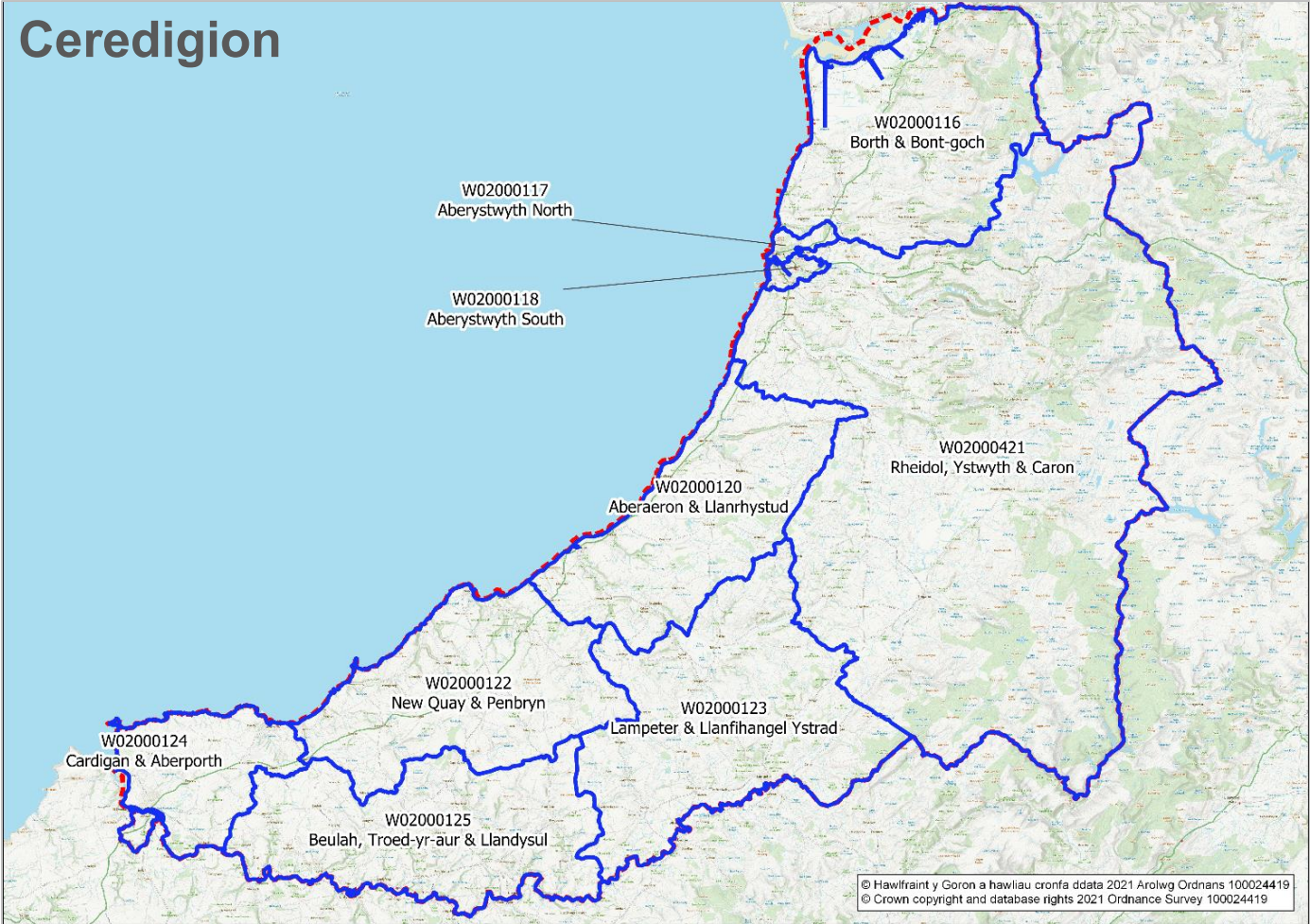
In each case, the PSB has carefully considered the risks and is prepared to tolerate them in order to deliver its vision of a fully merged Board and fully integrated joint assessment.

We are also aware of the data limitations in delivering the assessment. It is likely that there will be gaps in the data collection, particularly for small area statistics. It is also possible that the sample size of primary data collected for the Community Areas may be insufficient and thus, not representative of the entire population. To ensure transparency, the assessment will highlight these limitations and data gaps, which will highlight topic areas that require further research beyond the publication of the assessment.

Appendix 1 - Community Areas in Carmarthenshire and Ceredigion



Ceredigion



**Appendix 3: Summary Timeline for Carmarthenshire and Ceredigion
Public Services Board**

Timeline

Assessment of Local Well-being

