

REPORT TO: WEST OF ENGLAND COMBINED AUTHORITY

DATE: 8 April 2022

REPORT TITLE: INVESTMENT FUND PROGRAMME

**AUTHOR: RICHARD ENNIS, DIRECTOR OF INVESTMENT
AND CORPORATE SERVICES**

Purpose of Report

1. To update on the overall programme and headroom.

Impact of Covid-19 pandemic

The Combined Authority has actively reviewed its key activities and work programme to reflect changing priorities as a result of the Covid-19 pandemic. Specific issues relating to the Covid-19 situation that impact on or are addressed through this report are as follows:

- £16m of funding through the Investment Fund has already been awarded to drive Covid-19 economic recovery and the addition of a further £5m of funding is proposed.
- More generally supporting clean and inclusive economic growth is a key driver for the Investment Fund and all the projects within the programme will make a positive contribution to assisting the economic recovery.
- The Combined Authority will continue to review the deliverability, and priority, of its investment programme in response to Covid-19. Further updates will be provided through each committee cycle.

Recommendations:

The Committee is asked to:

1. **To return the £4.1m balance of the previous allocations for the Land Acquisition and Development Infrastructure Funds and Love Our High Streets to create further headroom.**
2. **To approve the Full Business Case for the Bath Local Centres High Street Improvement scheme and the award of £295k subject to confirmation of the match funding.**

3. To approve the Full Business Case for Bath River Line Phase 1 and the award of £1.048m subject to securing necessary planning consent and the value for money assessment for both phases presenting high value for money
4. To allocate £79k to the Mini-Holland Pilot Scheme and delegate the approval of a Feasibility and Development Funding Application to the Combined Authority Chief Executive in consultation with the Chief Executives of the constituent Councils.
5. To approve a further allocation of £10m for the development of an Outline Business Case for new public transport from the Investment Fund headroom.
6. To approve the Feasibility and Development Funding Application for the B&NES Strategic Masterplanning and award of £1.345m.
7. To approve the South Gloucestershire Council Feasibility and Development Funding Application for the Evidence to support Transition from Spatial Development Strategy to Local Plan Making programme and the award of £900k.
8. To allocate a further £750k for Strategic Masterplanning subject to this being drawn down at the next Committee and delivery being completed by 2023/24.
9. To approve the Feasibility and Development Funding Application for the Bristol Avon Flood Strategy – Active Travel & Green Infrastructure Greenway and the award of £482k.

Background

2. As reported to the Committee in January, in order to re-establish a five year programme, the time horizon for the Investment Fund programme has been extended by a further three years to March 2026. The total funding over the period to March 2026 amounts to £450m including overprogramming of some £40m (10% of funds unspent). The £450m of Combined Authority funding available up to March 2026 is made up of:
 - £30m of Investment Fund per annum x 10 years (16/17 to 25/26) £300m
 - Transforming Cities Funding (to be spent by March 2023) £103m
 - One year succession to Local Growth Funding for 21/22 £7.4m
 - Structured over-programming of delivery against spend £39.6m

Investment Fund Headroom

3. With the approvals made at the Combined Authority Committee meeting in January the headroom within the £450m Investment Fund programme to 25/26 stands at **£55.2m**. A summary of all the approved and allocated funding across

the Investment Fund and Transforming Cities Fund (TCF) is shown in Appendix 1 and is summarised in Figure 1, which includes the approvals proposed to this Committee. The changes through the approvals included in this report or elsewhere on the agenda are summarised in Figure 2.

Figure 1: Summary of Investment Programme to 2026 by Priority Theme

	Funding Awards and Allocations £000s	
	Jan 2022	Apr 2022
<i>Transport Infrastructure</i>		
Approved Awards and Allocations	116,341	119,968
Associated 'tail' required to deliver all projects up to March 2026	38,644	44,816
Total Investment in Transport Infrastructure	154,985	164,784
<i>Housing, High Streets and Green Infrastructure</i>		
Approved Awards and Allocations	79,655	77,627
Associated 'tail' required to deliver all projects up to March 2026	995	869
Total Investment in Housing Infrastructure	80,650	78,495
<i>Business and Skills</i>		
Approved Awards and Allocations	121,411	122,763
Associated 'tail' required to deliver all projects up to March 2026	18,949	18,628
Total Investment in Business and Skills Infrastructure	140,360	141,391
<i>Leverage Match Fund / Other</i>		
Funding put aside to respond to external funding opportunities	9,061	9,061
Approved CA set up, operating costs and elections up to 2026	9,768	9,768
Headroom	55,177	46,501
Total Investment Programme up to March 2026	450,000	450,000

Figure 2: Summary of Funding Approvals at this Committee

Para	Project/Programme	Amount	Change to Headroom	Headroom Balance
Position including decisions at the January Committee				£55.2m
4	Sub Funds	£4.1	+£4.1	£59.3m
5	Business Cases Utilising Existing Allocations or 'Tails'	£10.4m	-	£59.3m
7	Regional Recovery and Adaptions Fund	£5m	-	£59.3m
8	New Public Transport System	£10m	-£10m	£49.3m
10	Strategic Masterplanning	£995k	-£995k	£48.3m
15	Bristol Avon Flood Strategy	£482k	-£482k	£47.8m
17	South Bristol Light Industrial Workspace	£1.554m	-£1.554m	£46.2m
17	Cribbs Patchway New Neighbourhood Cycle Links	£300k	+£300k	£46.5m

Sub-Funds

4. As set out in the report to the January Committee, with the extended opportunity to present business cases or applications which are already in train, it is now planned to remove the balance of the allocations previously approved for a number of sub-funds, namely the Love Our High Streets programme, Land Acquisition, Development Infrastructure, and Housing and Regeneration Enabling Funds. It is proposed the balance of the Business and Skills allocation is used to fund items 3) – 5) below. The balance of £11.7m reported in January would be reduced by the following:
- 1) Bath Local Centres High Street Improvement Scheme £295k (see paragraph 6)
 - 2) B&NES Housing and Regeneration Enabling Fund application £750k - approved through delegation in March (see paragraph 18) and fully expends this fund.
 - 3) It is proposed the £5m business and skills allocation is rolled into the Regional Recovery and Adaptions Fund
 - 4) Careers Hub 22/23-24/25 £810k (see paragraph 6)
 - 5) The Courts £758k (see paragraph 6)

Therefore, the removal of the remaining balances for the sub-funds would return £4.1m to the headroom, bringing this to **£59.3m**.

Recommendation to return the £4.1m balance of the previous allocations for the Land Acquisition and Development Infrastructure Funds and Love Our High Streets to create further headroom.

Business Case and Applications Seeking to Draw on Existing Allocations

5. A number of business case and applications have been submitted seeking approval at this Committee. In line with the Delivery Assurance report on this agenda, these schemes will fall within the new provisions. In particular, to help counter delay which has been widespread across the programme, there will be a requirement for a Committee decision on whether to continue, pause and review, or cease funding for schemes which are delayed by an aggregate total of 12 months from the milestones agreed at approval. These milestones will include those for project completion which are set out in the project descriptions for schemes seeking approval below. It is also planned to strengthen the approach to reporting and the escalation of delays and cost changes to ensure effective utilisation of funding, and to incentivise timely delivery. The new funding approvals set out in this report will follow the delivery assurance 'use it or lose it' principles as set out in the Delivery Assurance Report on this agenda, subject to the approval of that report.

6. The following projects have presented business cases or development funding applications seeking to draw on a total of some £10.4m from existing allocations and delivery 'tails':
 - **Community Pollinator Fund £1.458m** – a [Full Business Case](#) from the Combined Authority for a three year grant funding programme to support community-led ecology projects that enhance biodiversity and pollinator habitats across the region. The project is expected to complete in March 2025. These funds could be accommodated with the Green Recovery Fund (see Green Recovery Fund report on this agenda). The Assessment Summary Table is shown in Appendix 2.

 - **Retrofit Accelerator £3m** – an [Outline Business Case](#) from the Combined Authority to create a single point of contact and support network for homeowners across the region who want to retrofit their property. The project is expected to complete in October 2025. The funds link to an existing allocation within the Green Recovery Fund (see Green Recovery Fund report on this agenda). The Assessment Summary Table is shown in Appendix 3.

 - **West of England Electric Vehicles (EV) Charging Strategy** – a [Feasibility and Development Funding Application](#) from the Combined Authority for £100k in 22/23 to develop business cases for infrastructure to support electric vehicles around the themes of low cost on-street residential charging, residential charging hubs, destination chargers in public car parks and EV Car Clubs (see Green Recovery Fund report on this agenda). The business cases will be produced by February 2023.

- **Careers Hub 22/23-24/25 £810k** – a Full Business Case from the Combined Authority for the continuation of the Careers Hub for a further three academic years running to August 2025. It is expected that match funding would be provided by the Careers Enterprise Company, but should this not be forthcoming further funding would need to be sought and/or activities scaled back (see separate report on this agenda). This project could draw on the Business and Skills allocation. The Assessment Summary Table is shown in Appendix 4 and the Full Business Case is published on the Combined Authority [website](#).
- **The Courts £758k** – a Full Business Case submitted by the Creative Youth Network to redevelop Bristol's old Victorian Magistrates Courts (The Courts) into a creative industries hub, opening employment pathways into the creative sector for young people, while also providing workspace for creative industry businesses (see separate report on this agenda). Project delivery is expected to complete by July 2023. This project could draw on the Business and Skills allocation. The Assessment Summary Table is shown in Appendix 5 and the Full Business Case is published on the Combined Authority [website](#).
- **Bath Local Centres High Street Improvement Scheme £295k** – a Full Business Case produced by Bath & North East Somerset Council for a package of interventions that improve the street environment and promote increased animation of public spaces across four district or local centres in Bath - Twerton High Street, Moorland Road, Weston High Street and Mount Road. These funds could be drawn from the Love Our High Streets allocation. The project is match funded by £180k from the Council and Bath Spa University, and a balance of some £14k from the High Streets Pilots, and delivery is expected to complete in June 2024. The Assessment Summary Table is shown in Appendix 6 and the Full Business Case is published on the Combined Authority [website](#).

Recommendation to approve the Full Business Case for the Bath Local Centres High Street Improvement Scheme and the award of £295k subject to confirmation of the match funding

- **Metrobus Consolidation £1.828m** – a Full Business Case for a package of interventions to provide facility and network improvements along the three existing Metrobus routes to improve the journeys for users and encourage increased bus patronage. The scheme is planned to complete in April 2023. These funds could be drawn from the 'tail' for bus infrastructure (see CRSTS Delivery report on this agenda). The Assessment Summary Table is shown in Appendix 7 and the Full Business Case is published on the Combined Authority [website](#).
- **A4 Portway Park & Ride Expansion £942k** – a Full Business Case for the expansion of the existing Park & Ride facility to serve future increased demand for bus and rail based journeys. The scheme is expected to complete in January 2023. These funds could be drawn from the 'tail' for bus infrastructure (see CRSTS Delivery report on this agenda). The Assessment Summary Table is shown in Appendix 8 and the Full Business Case is published on the Combined Authority [website](#).

- **A38 South Bristol Sustainable Transport Corridor £100k** – this project aims to improve the metrobus provision between Bristol and Hengrove to the Bristol and North Somerset boundary. An allocation of £100k is requested to commence the Outline Business Case for the corridor and the Full Business Case for the Bedminster Green section, with a requested delegation for the approval of a Feasibility and Development Funding application to the Combined Authority Chief Executive in consultation with the Chief Executives of the constituent Councils. These funds could be drawn from the ‘tail’ for bus infrastructure (see CRSTS Delivery report on this agenda).
- **Mini-Holland Pilot Scheme £79k** - At the start of August 2021, the Combined Authority submitted an Expression of Interest from each of the Councils for the Department for Transport’s Mini-Holland pilot scheme. We were informed in March that we would be receiving £78,947 for a feasibility study for either the Bristol or the South Gloucestershire interest areas – East Bristol and Yate respectively.

The DfT will use the outputs from the feasibility study to identify the 12 pilot areas nationally that would receive delivery funding, expected to be in the region of £10m. It is proposed to match the £78,947 from the DfT with funding from the Investment Fund through a Feasibility and Development Funding Application to enable both areas to complete feasibility studies to the DfT guidance. The funds could be accommodated within the transport ‘tail’.

This approach would allow the Combined Authority to make an informed decision based on the outcome of the feasibility studies as to which scheme is likely to have the greatest chance of success of funding in the Mini-Holland pilot programme. The scheme that is not then submitted can still utilise the outputs from the feasibility study, as both areas identified have funding allocated through the Liveable Neighbourhood programmes in CRSTS.

Recommendation to allocate £79k to the Mini-Holland Pilot Scheme and delegate the approval of a Feasibility and Development Funding Application to the Combined Authority Chief Executive in consultation with the Chief Executives of the constituent Councils

- **Bath River Line Phase 1 £1.048m** – a Full Business Case submitted by Bath & North East Somerset Council for a number of interventions in the west of Bath, between Newbridge and Bath Quays including improved paths, lighting, wayfinding and planting. The works on site are expected to complete in February 2023. These funds could be accommodated within the ‘tail’ for Bath River Line. Match funding of £563k is to be provided by the Council. The Assessment Summary Table is shown in Appendix 9 and the Full Business Case is published on the Combined Authority [website](#).

Recommendation to approve the Full Business Case for Bath River Line Phase 1 and the award of £1.048m subject to securing necessary planning consent

and the value for money assessment for both phases presenting high value for money.

Increased Allocations

Regional Recovery and Adaptions Fund

7. As set out elsewhere on this agenda, it is proposed to increase the Regional Recovery and Adaptions Fund by a further £5m which can be accommodated by reallocation from the current Business and Skills allocation, as set out in paragraph 4.

New Public Transport

8. Investing in public transport is a top priority for the West of England to tackle the climate emergency and to support our economy. We have funded the production of a Strategic Outline Business Case (SOBC) which will look to demonstrate that there is a practical, viable and affordable proposition for Government to invest in. We are also committed to taking this forward to the Outline Business Case and Full Business Case stage and propose to allocate a further sum at this stage to demonstrate that long term commitment.
9. In making an allocation it should be recognised that there remain levels of uncertainty around the costs of the project in particular, the scope of the project and the significant cost implications of different solutions still in play, the timing of the project and the practicality of moving forward with a number of major projects in parallel and our ability to attract development funding from the Department for Transport (DfT) and other sources once the SOBC is agreed. Given these uncertainties the following approach is therefore proposed.
 - Develop the SOBC using the existing £7m allocation to the project.
 - Immediately commit a further £10m from the headroom to develop the Outline Business Case (OBC) over the next 18 months.
 - Make a firm commitment by the Combined Authority to developing both the OBC and Full Business Case (FBC) – recognising that the overall development costs over time could run to very large sums depending on the scope.
 - Review the allocation in the Autumn in the light of the SOBC and negotiations with DfT to reflect more up to date info scope, timing and external funding.

Recommendation to approve a further allocation of £10m for the development of an Outline Business Case for new public transport from the Investment Fund headroom.

Strategic Masterplanning

10. Building on a number of previous awards for masterplanning across the area, at the Committee meeting in January a further £2m was allocated to support specific strategic masterplanning projects. The following applications have been received seeking to draw on this allocation:

- **B&NES Strategic Masterplanning** – a [Feasibility and Development Funding Application](#) has been submitted by Bath & North East Somerset Council seeking to draw on £1.345m of this funding together with £535k of match funding from the Council. The work will be undertaken in 22/23 and will involve improving the technical knowledge of the Broad Locations for Growth, and to support Strategic Place Assessments to help inform the local plan. This will culminate in the production of Strategic Planning Frameworks for specific locations which will help to deliver better planning outcomes.

Recommendation to approve the Feasibility and Development Funding Application for the B&NES Strategic Masterplanning and the award of £1.345m

- **Evidence to support Transition from Spatial Development Strategy to Local Plan Making** – a [Feasibility and Development Funding Application](#) has been submitted by South Gloucestershire Council seeking to draw on £900k of this funding. The work to be undertaken would have two strands: a Local Area Transport Study to fully understand the impacts on the local transport network and the preparation of Concept Planning Frameworks necessary to get from SDS Broads Locations for Growth to South Gloucestershire local plan allocations. The work is planned to be complete by November 2023.

Recommendation to approve the South Gloucestershire Council Feasibility and Development Funding Application for the Evidence to support Transition from Spatial Development Strategy to Local Plan Making programme and the award of £900k

11. The total funding requirement of these two proposals is £2.25m which is above the allocation agreed at the last Committee. It is therefore proposed to increase the overall fund to £3m to enable a further proposal to come forward from Bristol City Council for consideration at the next Committee.

Recommendation to allocate a further £750k for Strategic Masterplanning subject to this being drawn down at the next Committee and delivery being completed by 2023/24.

Regional Investment Priorities

12. Work has been initiated to consider the investment priorities over the next 10-15 years which reflect the agreed key regional objectives. This process will look beyond the Investment Fund and the funding currently available, to establish the investment required to enable us to meet the agreed objectives. It is intended that these regional objectives, the principles to help shape and sequence the programme and the key interventions needed are to be reported to the Committee in June. Decisions on new schemes seeking to access the headroom

at this Committee at therefore focused on the business cases which were already in train.

13. It is clear that this process will result in shift in emphasis going forward as compared to the previous programme developed in 2019. In particular, with the £510m of additional transport funding secured through the City Region Sustainable Transport Settlement it is to be expected that the proportion of funding through the Investment Fund for transport interventions will reduce. That being said, work will clearly need to continue on a new and transformative public transport system (see paragraph 8-9) which remains key to tackling the climate emergency and supporting the economy.
14. The revised investment programme will need to reflect priorities that have emerged or strengthened since the previous investment plan was set in 2019. For example, Committee has asked for an increase in ambition in tackling the climate and ecological emergency. Our investment programme will therefore need to reflect this. Other key priorities for the revised investment programme are expected to include finding a solution to the housing crisis by supporting, with partners, comprehensive flood solutions that will unlock key regional housing growth sites. There also needs to be a greater emphasis placed on culture, including a proposal for the creation of a cultural investment fund.

Programmes and Projects Seeking to Draw on the Headroom

15. The following project have presented business cases or development funding applications seeking to draw on the Investment Fund headroom:
 - **Bristol Avon Flood Strategy – Active Travel & Green Infrastructure Greenway £482k** – a [Feasibility and Development Funding Application](#) to progress Phase 1 of the project to Outline Business Case by September 2023, including the development of a funding strategy. This funding will enable the scope of the OBC to be broadened to demonstrate the full potential of the Strategy for the region. The application notes that the additional elements may increase the overarching phase 1 estimate of £216m and the identified funding gap to be addressed by partner organisations.

Recommendation to approve the Feasibility and Development Funding Application for the Bristol Avon Flood Strategy – Active Travel & Green Infrastructure Greenway and the award of £482k.

16. The awards and allocations set out in paragraphs 8-9, 11 and 15 would draw on some £11.2m of the headroom reducing the balance to **£47.8m**.

Changes to Schemes in the Current Programme

17. Subject to approval, the changes to the schemes in the current programme as reported elsewhere on this agenda would have the following impact on the headroom available:
 - **South Bristol Light Industrial Workspace** – call on £1.555m of the headroom

- **Cribbs Patchway New Neighbourhood Cycle Links** – return of £300k to the headroom.

With these changes the headroom would stand at **£46.5m**

Delegated Decisions

18. The following decisions related to funding through previously agreed Investment Fund allocations have been taken since the last report:

- **B&NES Housing and Regeneration Enabling Fund** – the Combined Authority Committee in December 2020 allocated £2m for a Housing and Regeneration Enabling Fund and delegated the approval of Feasibility and Development Funding applications to the Combined Authority Chief Executive in consultation with the Chief Executives of the constituent Councils.

A [Feasibility and Development Funding Application](#) was been submitted by B&NES seeking £750k through the HREF. The four areas of focus of the application are Twerton in Bath and the town centres of Keynsham, Midsomer Norton and Radstock. These regeneration areas relate closely to locations of strategic housing growth and areas of employment growth (including the Enterprise Areas and SDS growth areas) and are all town/local centres that have been significantly impacted by Covid 19 damaging the vitality as places. The expected outputs are Regeneration Action Plans for Keynsham & Radstock Town Centre and Concept Masterplans for Twerton and Midsomer Norton High Street Core (all completed by March 2025) together with business case development. The application was approved through the granted delegation in March.

Consultation

18. Engagement has taken place with officers in the West of England Combined Authority Constituent Unitary Authorities. Section 151 Officers across the region have been fully engaged as have the Chief Executive Officers in helping to inform the prioritised projects for investment.

Other Options Considered

19. All Business Case are required to set out in detail the full range of options considered and the reason the preferred option has been identified.

Risk Management/Assessment

20. Specific risk assessments will be carried out as part of any feasibility studies for projects in development and business cases are required to set out the way that risks will be managed and a risk register. All projects underway will maintain a

specific risk register as part of the project management and monitoring arrangements.

21. Financial risks are managed through the process for considering cost increases as set out in the Combined Authority Investment Strategy. The overall Investment Fund and Transforming Cities Fund programme will be regularly reviewed.

Public Sector Equality Duties

22. The public sector equality duty created under the Equality Act 2010 means that public authorities must have due regard to the need to:
 - Eliminate unlawful discrimination, harassment and victimization and other conduct prohibited by the Act.
 - Advance equality of opportunity between people who share a protected characteristic and those who do not.
 - Foster good relations between people who share a protected characteristic and those who do not.
23. The Act explains that having due regard for advancing equality involves:
 - Removing or minimising disadvantages suffered by people due to their protected characteristics.
 - Taking steps to meet the needs of people from protected groups where these are different from the needs of other people.
 - Encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low.
24. The general equality duty therefore requires organisations to consider how they could positively contribute to the advancement of equality and good relations. It requires equality considerations to be reflected in the design of policies and the delivery of services, including policies, and for these issues to be kept under review.
25. For projects seeking funding through the Investment Fund scheme promoters are required to include as part of their Full Business Case, an equality and diversity assessment and plan. These assessments are published as part of the Business Case on the Combined Authority website.

Finance Implications, including economic impact assessment where appropriate

26. The financial implications for each proposal are set out in the body of the report. The Investment Fund allocations and awards are accommodated within the overall spending limit of £450m available up to March 2026.
27. The Combined Authority statutory finance officer will determine the appropriate use and apportionment of funding between the Transforming Cities Fund and Investment Fund within the overall funding available.

28. Supporting economic growth is central to this funding stream, and promoters are required to include an economic case within the FBC for each scheme which sets out how the project will create jobs and GVA growth as well as delivering wider benefits. In line with agreed processes these FBCs are published on the Combined Authority website at the point of decision making.

Advice given by: Richard Ennis, Interim Director of Investment and Corporate Resources

Legal Implications

29. There are no additional legal implications arising from this report. Legality will be verified for individual projects through relevant due diligence prior to approving formal allocations.

Advice given by: Stephen Gerrard, Interim Monitoring Officer, West of England Combined Authority

Climate Change Implications

30. On 19 July 2019, the West of England Combined Authority declared a climate emergency, recognising the huge significance of climate change and its impact on the health, safety and wellbeing of the region's residents. The Combined Authority is committed to taking climate change considerations fully into account as an integral part of its governance and decision making process.

Each report/proposal submitted for Combined Authority / Joint Committee approval is assessed in terms of the following:

Will the proposal impact positively or negatively on:

- The emission of climate changing gases?
- The region's resilience to the effects of climate change?
- Consumption of non-renewable resources?
- Pollution to land, water or air?

Particular projects will also be subject to more detailed environmental assessment/ consideration as necessary as part of their detailed project-specific management arrangements.

31. Each business case coming forward for decision on inclusion in the Investment Fund programme includes consideration of environmental sustainability which sets out how sustainability is being considered in the development of the project as well as during its operational stage.

Land /Property Implications

32. All land and property implications are set out within the specific business cases and dealt with by scheme promoters.

Advice given by: Richard Ennis, Interim Director of Investment and Corporate Resources

Human Resources Implications

33. There are no direct human resource implications arising from this report.

Appendices:

Appendix 1 – Investment Fund Programme

Appendix 2 - Community Pollinator Fund Assessment Summary Table

Appendix 3 - Retrofit Accelerator Assessment Summary Table

Appendix 4 - Careers Hub 22/23-25/26 Assessment Summary Table

Appendix 5 - The Courts Assessment Summary Table

Appendix 6 - Bath Local Centres Assessment Summary Table

Appendix 7 - Metrobus Consolidation Assessment Summary Table

Appendix 8 - Portway Park & Ride Expansion Assessment Summary Table

Appendix 9 - Bath River Line Phase 1 Assessment Summary Table

West of England Combined Authority Contact:

Any person seeking background information relating to this item should seek the assistance of the contact officer for the meeting who is Ian Hird on 07436 600313; email: democratic.services@westofengland-ca.gov.uk

Appendix 1

Transport Infrastructure Projects – Awards and Allocations to 25/26 (£000s)

	Jan 2022	Apr 2022
Feasibility Studies		
A420 to Bath Highway Improvements	200	200
Bristol Temple Meads Masterplan	2,000	2,000
Winterbourne/Frampton Cotterell Bypass and Coalpit Heath/Westerleigh Bypass Study	413	413
Regional Operations Capability – Phase 1	75	75
Strategic Rail Investment	250	250
Improving Access to Bath from the East	200	200
Access for All – Step Free Access Study	100	100
10 Year Rail Delivery Plan Scheme Development	470	470
Bus Service Improvement Plan and Enhanced Partnership	537	537
Step Free Station Proposals Phase 2	150	150
Mini-Holland Pilot Scheme	-	79
Business Case Development		
MetroWest Phase 2	11,203	11,203
Charfield Station	4,123	4,123
MetroWest Phase 1	5,860	5,860
New Public Transport	2,863	2,863
Integrated Smart Ticketing	300	300
Local Cycling & Walking Infrastructure	100	100
Manvers Street Regeneration	250	250
Bus Infrastructure Programme and Park & Ride	4,150	4,150
West of England Station Enhancements Project	552	552
North Fringe Public Infrastructure Package	350	350
Bristol to Bath A4 Strategic Corridor	1,772	2,372
Bath Quays Bridge Cycle/Pedestrian links	170	170
Bath University Walking & Cycle routes	80	80
Old City and King Street	344	344
St George Liveable Neighbourhood	150	428
Strategic Cycle Route - Thornbury to A38 via Alveston	125	125
Strategic Cycle Route - Yate to East Fringe (Yate Spur)	125	125
Fieldings Bridge	50	50
Bath Road – Keynsham	62	62
Silver Street/Fosseway walking route	62	62
City Centre to Weston Cycle route	62	62

Concorde Way / Dovercourt Depot	400	400
Thornbury – Grovesend / Gillingstool (Phase 2	100	100
Ring Road – Filton to MOD	145	145
Keynsham Road to Bitton	145	145
Electric Vehicles Charging Strategy	-	100
A38 South Bristol Sustainable Transport Corridor	-	100

<i>Schemes in Delivery</i>		
Real Time Information System Upgrade	559	559
Lockleaze Sustainable Transport Improvements	3,915	3,915
Cribbs Patchway Cycle Links	3,306	3,006
Cribbs Patchway MetroBus Extension	22,151	22,151
Integrated Transport Authority Functions	1,000	1,000
On-Bus Contactless Bank Card Payment	416	416
Wraxall Road Roundabout Improvements	6,887	6,887
Future Transport Zone*	3,655	3,655
Bristol Temple Meads Eastern Entrance	23,648	23,648
Yate A432 Park and Ride	4,499	4,499
On Bus Tap On, Tap Off	1,200	1,200
Metrobus Consolidation	-	1,828
A4 Portway Park & Ride Expansion	-	942

<i>Completed Projects</i>	7,169	7,169
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Total of all Awards and Allocations:	116,341	119,968
Associated 'Tail' for Approved Schemes in Development	38,644	44,816
Total	154,985	164,784

Note: * Excludes DfT funding of £24.366m

Housing, High Streets and Green Infrastructure Projects – Awards and Allocations to 25/26 (£000s)

	Jan 22	Apr 22
Feasibility Studies		
B&NES Pilot High Streets Programme	250	250
Bedminster High Street Improvement	275	275
Kingswood High Street Improvements	322	322
Strategic Planning Shared Evidence Base	5,750	5,750
OPE8 Housing Enabling Fund	500	500
Business Case Development		
Masterplanning: Yate Urban Living Opportunity Area	580	580
Masterplanning: business case development	275	275
Masterplanning: North Fringe of Bristol	500	500
Masterplanning: South West Bristol	500	500
Masterplanning: Brislington and North Keynsham	250	250
Green Infrastructure	300	300
Milsom Quarter Masterplan	434	434
East Fringe Masterplan (including Junction 18a)	350	350
Sevenside Matserplan	300	300
Parkway Station Masterplan	250	250
Frome Gateway and Bristol City Centre Delivery Plans	800	800
Western Harbour Placeshaping Vision	155	155
Thornbury High Street	200	200
HREF – South Gloucestershire Council Capacity	750	750
Temple Quarter Infrastructure Programme	2,226	2,226
B&NES Housing and Regeneration Enabling Fund	-	750
B&NES Strategic Masterplanning	-	1,345
Evidence to Transition from SDS to Local Plan Making	-	900
Bristol Avon Flood Strategy	-	482
Schemes in Delivery		
Whitfield Tabernacle Stabilisation Works	682	682
Keynsham Town Centre Improvement	425	425
Chew Valley Lake Recreational Trail	1,006	1,133
North Keynsham Land Acquisition Fund	5,975	5,975
Bath City Centre High Streets Renewal Project	1,235	1,235
Bristol City Centre & High Streets Recovery & Renewal	2,725	2,725

Bottle Yard Studios - Hawkfield Business Park	11,953	11,953
Kingswood High Street	7,560	7,560
Thornbury Hospital (Land Acquisition Fund)	3,806	3,806
Common Connections	999	999
Midsomer Norton High Street Market Square	895	895
Bath Local Centres High Street Improvement Scheme	-	295

Allocations		
Love Our High Streets	691	-
Land Acquisition Fund (LAF)	219	-
Hengrove Park Enabling Works	19,800	19,800*
Development Infrastructure Fund (DIF)	3,018	-
Housing and Regeneration Enabling Fund	750	-
Strategic Masterplanning	2,000	750
LAF and DIF Repayments**	-8,297	-8,297
Completed Projects	9,247	9,247

Total of all Awards and Allocations:	79,655	77,627
Associated 'Tail' for Approved Schemes in Development	995	869
Total	80,650	78,495

Note: * Excludes repayment element, timing to be confirmed at Full Business Case.

** Includes Bath Riverside. Bottle Yard Studios - Hawkfield Business Park to be included.

Business and Skills Projects – Awards and Allocations to 25/26 (£000s)

	Jan 22	Apr 22
Feasibility Studies		
Visitor Economy/Regional Tourism	100	100
Cultural Strategy	60	60
CEIAG Research and Improvement Project	50	50
Building Employment and Enterprise Skills	20	20
Local CEIAG Action Research Activities	20	20
5G Logistics	179	179
West of England Talent Retention Platform	200	200
West of England Post-16 Education and Skills Estate Analysis	50	50
SEND Careers Information and Guidance Collaboration Pilot	20	20
Age All Advice Centre Pilot	336	336
Business Case Development		
Somer Valley Enterprise Zone and Infrastructure	1,510	1,510
Bath River Line	150	150
Quantum Technologies Innovation Centre+	34,974	34,974
Energy Strategy Action Planning / Climate Change Planning	250	250
I-START	850	850
Driving the Covid-19 Economic Recovery	795	795
The Coach House BAME Enterprise Hub	97	97
West of England Visitor Economy Recovery Project	254	254
Bath River Line - Bristol Bath Railway Path Extension	75	75
Schemes in Delivery		
Realising Talent	499	499
South West Institute of Future Technology	500	500
Business Innovation Fund	242	242
Workforce for the Future	4,100	4,100
WE Work for Everyone	1,300	1,300
Future Bright Plus	3,600	3,600
South Bristol Enterprise Support	483	483
Centre for Digital Engineering Technology & Innovation	5,000	5,000
LIS Productivity Challenge Delivery Programme	3,557	3,557
Careers Hub and Enterprise Adviser Network 20/21	137	137
South Bristol Workspace	3,297	5,172

Reboot West	720	720
Low Carbon Challenge Fund Extension	2,243	2,243
Innovation for Renewal and Opportunity	6,717	6,717
Small Business Resilience Grant Programme	837	837
High Street Renewal Catalyst Fund	810	810
Culture and Creative Economy Recovery Fund	2,000	2,000
Digital Skills Investment Programme	2,000	2,000
Careers Hub and Enterprise Adviser Network 21/22	217	217
Community Support Fund	1,500	1,500
Community Pollinator Fund	-	1,458
Careers Hub 22/23-24/25	-	810
The Courts	-	758

Allocations		
Business and Skills allocation to be programmed up to 2026	6,991	-
Further Economic Recovery Measures	5,400	10,400
Green Recovery Fund	24,975	23,417
Retrofit Set Up Programme	200	200
Retrofit Accelerator	3,000	3,000

Completed Projects	1,098	1,098
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Total of all Awards and Allocations:	121,411	122,763
Associated Tail for Schemes in Development	18,949	18,628
Total	140,360	141,391

Appendix 2 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Community Pollinator Fund	Strategic Case	<p>A three year Community Pollinator Fund is proposed to promote and fund community-led ecology projects that enhance biodiversity and pollinator habitats across the region.</p> <p>Pollinators support biodiversity as they maintain the diversity of wild flowers and support healthy ecosystems, particularly by helping plants to produce fruits and seed which birds and other animals rely on. They are also vital for global agriculture, pollinating fruit, vegetable and many other food crops.</p> <p>The project aligns with the Government's 25 Year Plan policies to connect people and recovering nature, the DEFRA National Pollinator Strategy and the Climate Emergency Action Plan.</p> <p>The project will provide grants ranging from £1k to £100k for interventions such as the creation of native wildflower meadows/patches in community spaces and schools, planting for pollinators in community spaces, new paths or upgrading current informal paths, Green Roofs on public/community buildings and outdoor classrooms with suitable planting.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	West of England Combined Authority	Subsidy Control	<p>As there is a possibility that some applicants or projects will have the potential to distort markets, it will be necessary to undertake a subsidy control assessment for each project.</p> <p>If an application is received which has the potential to distort markets, the fund will utilise TCA Agreement Clause 3.2 (4) which can award subsidy aid below the level of 325,000 Special Drawing Rights (£344,600) over a three year period.</p>	Approval Requested	Full Business Case

Date of Submission	24/1/22		It is forecast that the project will create 31.2 hectares of new or improved pollinator habitats.		
Funding Requested	£1,458,075 revenue (profiled £135k 22/23, £676k 23/24 and £647k 24/25)	Economic Case and Value for Money	<p>The business case draws on work commissioned by Birmingham City Council's Parks and Green Space Service which established an annual value per hectare of publicly accessible green space. By applying the relevant metrics to ecosystem benefits for mental health, recreation, global climate regulation and biodiversity a total net present value of £4.47m is presented.</p> <p>Comparing this to the project cost gives a ratio of 2.6:1. Whilst this approach should be treated with some caution, it is recognised that there is no established methodology to determine value for money for an intervention of this type and few comparator schemes against which to benchmark.</p> <p>It is also forecast that the project will secure some 12,900 hours volunteer time.</p> <p>A letter has been provided by the Head of Strategy and Innovation confirming approval of the business case and the value for money statement.</p>	Funding Award	£1,458,075
Total Scheme Cost	£1.708m (£1.25m grants; £303k staff; £100k marketing; £55k other costs)	Risk	<p>There is no contingency allowed for in the costings.</p> <p>A risk register has been provided which identifies 10 key risks for the project. As the project moves into delivery these risks should be assigned owners, so responsibility of the risk and mitigation is clear.</p> <p>At this point in time the application process and assessment criteria are still to be developed and this will form part of the mobilisation phase.</p>	Grant Recipient	N/A

Match Funding %	29%	Delivery	Match funding of £500k is to be provided by grant beneficiaries The project will run over a three year period with delivery concluding in December 2024.	Payment Basis	N/A
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Scheme Description	Recommendation to the Combined Authority Committee	Approval of the Full Business Case
<p>The fund is expected to support in the region of 100 small scale habitat creation initiatives which empower and engage communities. Overall, the fund is expected to deliver the following outputs:</p> <ul style="list-style-type: none"> • 31.2Ha of new and improved pollinator habitats • 12,868 volunteer hours of community members practically engaged in habitat creation projects; • 3,639 community members practically engaged in habitat creation projects 	Conditions of Approval	None

Record of Approval

Combined Authority S73 Officer		West of England Combined Authority Committee	
Name	Richard Ennis	Date of Meeting	8 April 2022
Date		Decision	
Signature			

Appendix 3 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Retrofit Accelerator	Strategic Case	<p>Domestic emissions form 30% of the region’s total, largely from gas used for heating and cooking. Government have recently released the Heat and Buildings Strategy setting out its strategic plan for eliminating emissions from our homes and heating systems.</p> <p>There is some existing provision focussing on retrofit within the region, including but not limited to projects like Futureproof, recently awarded additional funding as part of the UK Community Renewal Fund, but there is nothing of sufficient scale to achieve the rate of retrofit that will be required to meet the area’s net zero ambition.</p> <p>The retrofit accelerator aims to create a highly visible, easily accessible support service for homeowners who want to retrofit their property. The service will offer advice and guidance to homeowners, encouraging and supporting them throughout the end-to-end process of retrofitting their properties, from initial thoughts about improvements, through surveying and advice on measures to apply and on to recommending and signposting to capable installers to carry out works.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	West of England Combined Authority	Subsidy Control	It is reported that the commercial approach to providing the network / service has not yet been agreed and this may involve either direct procurement or a grant approach. Should a grant approach be pursued it is noted that external expert advice would be needed in order to design the grant terms and conditions before it was offered. The approach, and as appropriate this advice, should be included in the Full Business Case (FBC).	Approval Requested	Outline Business Case

Date of Submission	14/2/22		It is estimated the current level of retrofits is 1,100 households per annum. It is forecast that this project could increase this by 33%, a further 363 retrofits per annum, or 1,089 over the life of the project. A key driver of the assessment this 33% increase should be elaborated upon in the FBC.		
Funding Requested	£3m revenue profiled £521k 22/23, £1.002m 23/24, £988k 24/25 and £489k 25/26)	Economic Case and Value for Money	<p>Based on evidence from other whole house retrofit programmes, it is assumed a whole house retrofit gives average saving to 1.5 tonnes per year and allocating a 10-year lifespan to measures installed generates a figure of 16,335 tonnes of CO2e saved. Applying a value of £245 for a tonne of CO2e saved from Valuation of Energy Use and Greenhouse Gas (BEIS) this gives benefits of £4.0m compared to the £3m cost.</p> <p>Drawing on a study, it can be expected that for each £1m invested in upgrading the energy efficiency of building stock will create 19 new direct jobs.</p> <p>It is estimated the average cost per home retrofitted is £20k, which based on the 1,089 additional homes retrofitted would generate some £22m of investment into retrofitting across the region. Applying the 19 jobs per £1m to the £22m, gives 418 direct new jobs relating to the additional works.</p> <p>A letter has been provided by the Director of Business and Skills confirming approval of the business case and the value for money statement.</p>	Funding Award	To be confirmed at Full Business Case
Total Scheme Cost	£3m (Service Provision £2.555m; Staff Costs £378k; Marketing £67k)	Risk	<p>No provision is made for risk or contingency in the high level costings.</p> <p>A risk register is provided which identifies 6 key risks. This should be developed and expanded for the FBC.</p>	Grant Recipient	N/A

Match Funding %	0%	Delivery	The Full Business Case is expected to be submitted later this year with service delivery to commence in October 2022. A Monitoring and Evaluation Plan will need to form part of the FBC.	Payment Basis	N/A
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Scheme Description	Recommendation to the Combined Authority Committee	Approval of the Outline Business Case
<p>The project aims to increase the levels of whole house retrofitting of private homes, raise awareness of best practice and models for retrofit, lever in better than the proportional expected level of national funding for retrofitting and to enhance coordination, network links and intelligence across the retrofit system.</p> <p>The accelerator will operate to PAS 2035 principles. This is a specification for ‘whole building’ retrofit, supporting an approach to the installation of energy efficiency measures (EEMs) which takes into account the requirement of the entire building, both from a technical standpoint and considering factors like occupancy comfort.</p>	Conditions of Approval	None

Record of Approval

Combined Authority S73 Officer		West of England Combined Authority Committee	
Name	Richard Ennis	Date of Meeting	8 April 2022
Date		Decision	
Signature			

Appendix 4 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Careers Hub 22/23-24/25 Academic Years	Strategic Case	<p>This proposal seeks funding to deliver the Careers Hub and Enterprise Adviser Network to 95 Schools and Colleges for a further three academic years. The Careers Hub holds a central role in delivery of WECA support for young people through the Employment and Skills Plan. This project will allow the Combined Authority to continue to build and develop its integrated portfolio of services, and deliver against Strategic Objective 2 (Enabling all young people to achieve their potential) and Strategic Objective 5 (Ensure employers are able to recruit and retain the diverse skills and talent they need to thrive).</p> <p>It is noted that the Careers Hub will continue to work collaboratively with partners to deliver and adapt the vision of the CEIAG strategy for young people. The strategic approach will better enable Combined Authority and its local authority partners to understand current provision, identify gaps and lever additional funding</p> <p>Careers Hubs are the delivery vehicle for the Government’s Careers Strategy which has been recently updated through the ‘Skills for Jobs’ white paper.</p> <p>The project aims to support the institutions in progressing towards attainment of 8 measures of effective careers guidance (Gatsby benchmarks).</p>	Funding Source(s)	Investment Fund
Scheme Promoter	West of England Combined Authority	Subsidy Control	The project is non-economic in nature	Approval Requested	Full Business Case

Date of Submission	3/2/22	Economic Case and Value for Money	<p>The economic case draws on the research paper The Economic Benefits of Careers Guidance, which states ‘evidence shows that career guidance can have substantial benefits for the economy by supporting individuals to enhance their capacities in ways that contribute to enhanced jobs, skills and growth’.</p> <p>In 2020, the CEC commissioned a report estimating the return on investment of personal guidance in England. This analysis indicates that, at a typical direct cost of £80 per young person for two interviews during secondary education, personal guidance is highly likely to achieve an average social return of £808 for each student.</p> <p>On the basis of that the programme will enable all 95 schools and Colleges to achieve all 8 Gatsby benchmarks over the three year period, this suggests a return of £18.6m, or £11 per every £ of investment.</p> <p>It is planned over the course of the 3 year programme to put in place systems to better understand the actual benefits to learners.</p> <p>A letter has been provided by the CA Director of Business and Skills confirming approval of the business case and the value for money statement.</p>	Funding Award	£810,000
Funding Requested	£810k (profiled £223k 22/23, £234k 23/24, £247k 24/25 and £106k 25/26)				
Total Scheme Cost	£1.875m (£1.578 staff including overheads; £210k Central Hub funds, £93k UA Collaboration Fund)	Risk	<p>There is no specific allowance for contingency in the costings.</p> <p>A risk register has been provided which includes 6 key risks for the project. It is advised this level of risk assessment has been adequate for delivery in previous years.</p> <p>£1.06m of match funding is assumed from the Careers Enterprise Company of which only the £206k for 22/23 is currently secure. Should the match funding not be secured the activity within this business case would have to be scaled back and/or further funding secured.</p>	Grant Recipient	N/A

Match Funding %	60% (although not all confirmed)	Delivery	<p>Careers Hubs are funded by the Careers and Enterprise Company who work in partnership through match funding agreements.</p> <p>The delivery of the Careers Hub will be through the existing team based at WECA with experience of previous phases.</p> <p>Funding of £93k is allowed for to enable the Careers Hub to work with B&NES, Bristol and South Gloucestershire Councils to deliver a hub and spoke model where funding is made available for local delivery of careers support to meet the specific needs of their residents. The Careers Hub will co-design activity with UAs and agree targets which meet shared objectives.</p>	Payment Basis	N/A
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Scheme Description	Recommendation to the Combined Authority Committee	Approval of the Full Business Case
<p>This proposal would continue the Careers Hub and Enterprise Adviser Network across all 95 secondary schools and colleges in the West of England for the next 3 academic years.</p> <p>The project will support these institutions in progressing against the eight Gatsby Benchmarks, used nationally by schools to underpin their careers education, information, advice and guidance (CEIAG) provision.</p>	Conditions of Approval	None

Record of Approval

Combined Authority S73 Officer		West of England Combined Authority Committee	
Name	Richard Ennis	Date of Meeting	8 April 2022
Date		Decision	
Signature			

Appendix 5 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	The Courts	Strategic Case	<p>The Courts project aims to upskill and support a more diverse mix of young people into creative sector employment, deliver new space for creative businesses and bring back into public life an historic piece of local infrastructure.</p> <p>There is clear alignment with the Employment and Skills Plan (the scheme proposes skills training for young creatives from disadvantaged backgrounds) and Recovery Plan. The project also fits with the region's creative economy strengths and addresses the lack of high-quality workspace for the creative sector.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	The Creative Youth Network (CYN)	Subsidy Control	<p>It is stated that the skills training activities are not subsidy on the basis that CYN will not receive payment (or any other non-financial advantage) for carrying out this activity.</p> <p>Further it is stated that the hiring of short-term hire spaces and organising local events and the use of the Courts for a café will not constitute subsidy on the basis that these activities serve the local population and are therefore unlikely to distort competition more widely.</p> <p>This is accepted by the Combined Authority noting the risk sits with the CYN.</p>	Approval Requested	Full Business Case

Date of Submission	6/12/21	Economic Case and Value for Money	<p>It is forecast the project will create 99 creative industry (at 90% occupancy from year 2) and 15 permanent staff jobs, equating to GVA of £3.77m</p> <p>Further it is forecast that 319 jobs (from year 2) in the creative sector will be secured through the project's activities equating to £7.34m GVA.</p> <p>Over a five year period this equates to GVA of some £54m giving a return of 8 to 1.</p> <p>A letter has been provided by the Creative Youth Network Chief Finance Officer confirming approval of the business case and the value for money statement</p>	Grant Award	£757,608
Funding Requested	£757,608 capital (profiled in 22/23)				
Total Scheme Cost	£6.38m (£6.1m capital; £282k revenue)	Risk	<p>Provision of £885k is made for contingency being 15% of the capital cost.</p> <p>A detailed risk register has been provided.</p>	Grant Recipient	The Creative Youth Network
Match Funding %	88%	Delivery	<p>The promoter the Creative Youth Network (CYN) was established as a young people's charity in 1973.</p> <p>Match funding of £4.25m is provided through the National Lottery Heritage Fund (NLHF) grant funding, with match of £1.375 from CYN and other sources.</p> <p>Full Planning Consent and Listed Building Consent have been approved.</p> <p>Project delivery is expected to complete by July 2023.</p>	Payment Basis	Quarterly in arrears on expenditure incurred

<i>Scheme Description</i>	<i>Recommendation to the Combined Authority Committee</i>	Approval of the Full Business Case
<p>It is planned that each year the Courts will deliver:</p> <ul style="list-style-type: none"> • New skills training opportunities for 500 16-25 year old emerging young creatives from disadvantaged backgrounds in Bristol and the West of England • Supported enterprise spaces for up to an additional 50 young people seeking to set up their own creative sector businesses • Paid internship opportunities for an additional 30 young people • Employment in the creative sector for at least 319 young people 	<i>Conditions of Approval</i>	None

Record of Approval

<i>Combined Authority S73 Officer</i>		<i>West of England Combined Authority Committee</i>	
<i>Name</i>	Richard Ennis	<i>Date of Meeting</i>	8 April 2022
<i>Date</i>		<i>Decision</i>	
<i>Signature</i>			

Appendix 6 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Bath Local Centres High Street Improvement Scheme	Strategic Case	<p>The project will include a package of targeted public realm interventions with support for events, animation and culture on the streets and in public spaces. These will be delivered across four district or local centres in Bath, namely Twerton High Street, Moorland Road, Weston High Street and Mount Road.</p> <p>The project aims to deliver against the five key priorities of 'Build Back Better High Streets' Strategy (July 2021) and focuses on a number of the concepts and interventions included within 'Supporting our High Streets after Covid-19' report (DLUHC, 2021) including mixed use High Streets, and 'meanwhile' uses to manage vacancy rates.</p> <p>The project links with the Council's Liveable Neighbourhoods initiative and the broader movement towards '15-minute cities/20-minute neighbourhoods'.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	Bath & North East Somerset Council	Subsidy Control	The interventions will be delivered on highway and will be open access.	Approval Requested	Full Business Case
Date of Submission	4/2/22	Economic Case and Value for Money	<p>It is forecast that 22 gross jobs will be created through planned pop up uses at the locations.</p> <p>After accounting for the additionality factors of leakage and displacement, and including the multiplier, it is estimated this equates to 19 direct net additional FTE jobs. Allowing for previous investment, 11 of</p>	Grant Award	£295,354

Funding Requested	£295,354 - £251k revenue and £44k capital (profiled £116k 22/23, £147k 23/24, £19k 24/25, £10k 25/26 and £5k 26/27)		<p>these can be attributed to this funding.</p> <p>Converting 11 FTEs to GVA and applying this over the duration of the interventions provides £1.42m of benefits. Comparing this to the cost gives a ratio of 2.9:1.</p> <p>Other social value impacts are also included such as from volunteering, returning people to work and supporting active travel.</p> <p>A letter has been provided by the B&NES S151 Officer confirming approval of the business case and the value for money statement</p>		
Total Scheme Cost	£489,297 (£39k Project Management; £371k Other Revenue costs; Pop Up Uses £22k, Public Realm £40k, Other Capital Costs £17k)	Risk	<p>Contingency of £32 is included in the costings being some 7% of the base cost.</p> <p>A detailed risk register has been provided which identifies the key risks for the project.</p> <p>It is not expected that the measures will require any planning, advertising or listed buildings consent, but this will not be confirmed until technical design is completed.</p>	Grant Recipient	Bath & North East Somerset Council
Match Funding %	40%	Delivery	<p>The project is match funded by £180k from the Council and Bath Spa University, and a balance of some £14k from the High Streets Pilots. £50k of the Council funding remains to be confirmed.</p> <p>No land acquisition is required with the works situated on the highway or Council owned land.</p> <p>Project delivery is planned to complete in June 2024.</p>	Payment Basis	Quarterly in arrears on expenditure incurred

<i>Scheme Description</i>	<i>Recommendation to the Combined Authority Committee</i>	Conditional approval of the Full Business Case
Measures to be delivered at various sites across the four locations include ‘greening’ interventions, cycle storage, community arts programme / trail, shopfront improvements, meanwhile uses, e.g. pop-up shops, community workspace, ‘make space’, wayfinding, events programmes, street furniture and community art.	<i>Conditions of Approval</i>	Confirmation of all match funding

Record of Approval

<i>Combined Authority S73 Officer</i>		<i>West of England Combined Authority Committee</i>	
<i>Name</i>	Richard Ennis	<i>Date of Meeting</i>	8 April 2022
<i>Date</i>		<i>Decision</i>	
<i>Signature</i>			

Appendix 7 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Metrobus Consolidation	Strategic Case	<p>The project will implement five facility and network improvements along three existing Metrobus routes in various locations in the greater Bristol area. These interventions will improve the journey experience for users and encourage increased bus patronage.</p> <p>The proposed interventions consist of modifications of some already existing infrastructure, as well as some additional infrastructure and re-routing.</p> <p>The project aligns with Joint Local Transport 4 and the Combined Authority Bus Strategy, in particular aims to develop the Metrobus network, maximise bus service reliability and reduce journey times, accessible passenger waiting facilities and better access to public transport.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	West of England Combined Authority	Subsidy Control	The scheme is not economic in nature	Approval Requested	Full Business Case
Date of Submission	28/1/22	Economic Case and Value for Money	<p>The economic appraisal estimates that the Metrobus Consolidation interventions would have benefits totalling £3.13m, and costs totalling £1.01m. The BCR for the scheme is estimated to be 3.08 and according to the DfT Value for Money categorisation, this scheme is likely to offer High Value for Money.</p> <p>The Optimism Bias used in the economic appraisal is 20%. Given the indicated level of quantified risk, it would be preferable that Optimism Bias was set on a consistent basis (ie at least 30%, if not the 36% indicated</p>	Funding Award	£1,827,977

Funding Requested	£1,827,977 (profiled in 22/23)		<p>from QRA). However, with the main BCR calculated at 3.08, increasing the Optimism Bias would still leave the BCR over 2.0 and not have material impact on the VfM statement.</p> <p>A sensitivity test has been undertaken using more conservative assumptions which provides reasonable confidence in the BCR being High.</p> <p>A letter has been provided by the CA Director of Infrastructure confirming approval of the business case and the value for money statement.</p>		
Total Scheme Cost	£1,827,977 (Preparation and PM £473k; Construction £820k; Other £535k)	Risk	The overall provision for risk/contingency is 36% of base costs based on the QRA outputs for each component of the scheme.	Grant Recipient	N/A
Match Funding %	0%	Delivery	Scheme opening is planned for December 2022, with iPoint installation to follow in April 2023.	Payment Basis	N/A

Scheme Description	Recommendation to the Combined Authority Committee
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<p>The planned measures include:</p> <ul style="list-style-type: none"> • Stoke Lane Priority Junction – a better priority solution for buses turning right onto Stoke Lane. • UWE bus stop upgrade – upgrade of one bus stop at the University of West England (UWE) bus station to accommodate Metrobuses in both directions. • Lyde Green Bus stop upgrade and re-routing – upgrade of bus stops opposite Lyde Green Primary School to Metrobus standard. • Thurlestone Bus Stops – the upgrade of one bus stop on Bamfield to Metrobus standard with a new Metrobus standard stop in the opposite direction. • Emerald Park - Increase bus layby length to improve bus pull out to mitigate against vehicles exceeding 30mph limit prior to limit increasing to 50mph. 	<p>Conditions of Approval</p>	
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Record of Approval

Combined Authority S73 Officer		West of England Combined Authority Committee	
Name	Richard Ennis	Date of Meeting	8 April 2022
Date		Decision	
Signature			

Appendix 8 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Portway Park & Ride Expansion	Strategic Case	<p>The Park & Ride facility provides key interchange opportunities for both car and pedestrian users, providing onward travel via bus. Whilst outside the remit of this business case, work is in progress to construct a single platform railway station on the Severn Beach railway line due to open in 2022.</p> <p>The site currently has capacity for 555 vehicles but a number of factors, such as continued growth in Park & Ride service after recovery from the decline during COVID and new demand for the rail station, are anticipated to lead to increasing demand to the point where it far exceeds the supply. It is therefore proposed to increase the capacity to 792 spaces.</p> <p>The proposal aligns a number of regional and national policies, including the Joint Local Transport Plan and Bus Strategy objectives in terms of improving public transport and delivering growth in bus usage.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	West of England Combined Authority	Subsidy Control	The scheme is not economic in nature	Approval Requested	Full Business Case
Date of Submission	28/1/22	Economic Case and Value for Money	<p>The appraisal estimates that the proposed car park expansion would lead to benefits totalling nearly £2m in the medium scenario, and costs totalling £0.75m, over a 20-year appraisal period. The BCR for the scheme is forecast as 2.64 in the medium (core) scenario. According to the DfT VfM categorisation, this scheme is likely to offer High Value for Money.</p> <p>The Optimism Bias used in the economic appraisal is 20%. This is substantially lower than the level of risk indicated in the Financial Case</p>	Funding Award	£942,216

Funding Requested	£942,216 (profiled in 22/23)		(35%). However, applying a higher level of Optimism Bias whilst reducing the BCR would not change the overall VfM conclusion that the scheme will provide High Value for Money A letter has been provided by the CA Director of Infrastructure confirming approval of the business case and the value for money statement.		
Total Scheme Cost	£942,216 (£622k Works; £75k Preparation and PM; £244k Risk and Inflation)	Risk	The overall provision for risk is 33% of base costs based on the QRA. All the works are contained within the boundary of the existing P&R site with existing consent. Therefore, no land acquisition or planning permission are required.	Grant Recipient	N/A
Match Funding %	0%	Delivery	It is planned to start the construction of the car park expansion in September 2022 and this to complete in January 2023. It is noted that potential improvements to the site entrance for cyclists and pedestrians are to be considered separately as part of A4 Portway scheme, and that separate proposals are under development for a Future Zone Mobility Hub at the site. While there may be practical reasons for progressing each of these separately, given the small scale of investments involved it would have been preferable for all these elements to be considered within a single business case (as was the case for the Yate Park & Ride scheme) for the development of the site as a multi-purpose hub.	Payment Basis	N/A

<i>Scheme Description</i>	<i>Recommendation to the Combined Authority Committee</i>	Approval of the Full Business Case
<p>As a key commuter route, the A4 Portway between the M5 and Bristol city centre is already congested. A large proportion of trips along the A4 are undertaken by private car, with most trips having destinations in the city centre. As such, in order to tackle the existing congestion challenges, a modal shift is needed from private cars to more sustainable transport modes.</p> <p>The proposed expansion of the Park and Ride facility will support the ambitions of intercepting private car trips on the A4 and shifting users to sustainable modes of travel such as bus and rail.</p>	<i>Conditions of Approval</i>	None

Record of Approval

<i>Combined Authority S73 Officer</i>		<i>West of England Combined Authority Committee</i>	
<i>Name</i>	Richard Ennis	<i>Date of Meeting</i>	8 April 2022
<i>Date</i>		<i>Decision</i>	
<i>Signature</i>			

Appendix 9 - Business Case Assessment Summary Table

Scheme Details		Appraisal Summary		Recommendation/ Conditions	
Project Name	Bath River Line Phase 1	Strategic Case	<p>The entire Bath River Line (BRL) is some 10km in length and will run from Newbridge in the west (connecting to the NCN4 Bristol- Bath cycle path) to Batheaston in the east.</p> <p>Phase1 will focus on an initial package of interventions in the western section of the BRL between Green Park and Newbridge. The western section was chosen as the first phase due to the strong partnership and collaborative practices already in place with partners the Canals and Rivers Trust.</p> <p>The project has strong fit with national, regional and local policy including 'A Green Future: Our 25 Year Plan to Improve the Environment', the West of England Joint Green Infrastructure Strategy, Joint Local Transport Plan 4 and the B&NES Draft Core Strategy and Place Making Plan Partial Update.</p>	Funding Source(s)	Investment Fund
Scheme Promoter	Bath & North East Somerset Council	Subsidy Control	The scheme is not economic in nature	Approval Requested	Full Business Case
Date of Submission	3/2/22	Economic Case and Value for Money	<p>The initial BCR for the scheme is 2.3:1, suggesting it has the potential to deliver high value for money.</p> <p>It is noted that the scheme will also have environmental benefits which are not reflected in the BCR calculation.</p>	Grant Award	£1,048,490

Funding Requested	£1,048,490 capital (profiled in 22/23)		A letter has been provided by the B&NES S151 officer confirming approval of the business case and the value for money statement		
Total Scheme Cost	£1.612m (£369k Preparation and PM; £122k Preliminaries; £683k Works; £338k Other Costs)	Risk	An allowance of £331k have ben made for risk and contingency representing 26% of the base cost. It is expected that the interventions on Bath Spa University and Rotork land will require planning permission. The team have had positive discussions with planning officers, and it is expected that there will be no problems in obtaining planning permission.	Grant Recipient	Bath & North East Somerset Council
Match Funding %	35%	Delivery	The project has £563k of secured match funding largely from CIL and S106. It is planned that construction works on site will run from July 2022 to February 2023.	Payment Basis	Quarterly in arrears on expenditure incurred

<i>Scheme Description</i>	<i>Recommendation to the Combined Authority Committee</i>	Conditional approval of the Full Business Case
<p>The measures proposed include:</p> <ul style="list-style-type: none"> • Wayfinding totems from Newbridge to Bath Quays, as well as at key access points. • Pilot lighting solutions - to address the conflict between needing to light the path, whilst safeguarding natural habitats and protecting sensitive species. • Improved access and gateways, widening and resurfacing the existing footpath and providing sections of new, accessible cycle path. • New tree and wildflower planting. • New seating and cycle racks. 	<i>Conditions of Approval</i>	Securing necessary planning consent and the value for money assessment for both phases presenting high value for money.

Record of Approval

<i>Combined Authority S73 Officer</i>		<i>West of England Combined Authority Committee</i>	
<i>Name</i>		<i>Date of Meeting</i>	8 April 2022
<i>Date</i>		<i>Decision</i>	
<i>Signature</i>			