

## Levelling Up Fund Application Form

This form is for bidding entities, applying for funding from the Levelling Up Fund (LUF) across the UK. Prior to completing the application form, applicants should read the [LUF Technical Note](#).

The Levelling Up Fund Prospectus is available [here](#).

The level of detail you provide in the Application Form should be in proportion to the amount of funding that you are requesting. For example, bids for more than £10m should provide considerably more information than bids for less than £10m.

Specifically, for larger transport projects requesting between £20m and £50m, bidding entities may submit the Application Form or if available an Outline Business Case (OBC) or Full Business Case (FBC). Further detail on requirements for larger transport projects is provided in the [Technical Note](#).

One application form should be completed per bid.

### **Applicant & Bid Information**

**Local authority name / Applicant name(s)\*:** [Rotherham Metropolitan Borough Council](#)

*\*If the bid is a joint bid, please enter the names of all participating local authorities / organisations and specify the lead authority*

**Bid Manager Name and position:** [Lorna Vertigan; Strategic Regeneration Manager](#)

*Name and position of officer with day-to-day responsibility for delivering the proposed scheme.*

**Contact telephone number:** [07748 142833](#)      **Email address:**  
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**Nominated Local Authority Single Point of Contact:** [Lorna Vertigan](#)

**Senior Responsible Officer contact details:** [Simon Moss, Assistant Director, Planning, Regeneration & Transport. simon.moss@rotherham.gov.uk](#)

**Chief Finance Officer contact details:** [Judith Badger, judith.badger@rotherham.gov.uk](#)

**Country:**

- England**
- Scotland**
- Wales**
- Northern Ireland**

Please provide the name of any consultancy companies involved in the preparation of the bid:

HLM Architects

Cube Construction Consultants

Edge PS Cost Consultants

Development Economics

The Retail Group

For bids from **Northern Ireland applicants** please confirm type of organisation

- |   |   |
|---|---|
| <input type="checkbox"/> Northern Ireland Executive | <input type="checkbox"/> Third Sector   |
| <input type="checkbox"/> Public Sector Body         | <input type="checkbox"/> Private Sector |
| <input type="checkbox"/> District Council           | <b>Other (please state)</b>             |

## PART 1 GATEWAY CRITERIA

Failure to meet the criteria below will result in an application not being taken forward in this funding round

### 1a Gateway Criteria for **all bids**

Please tick the box to confirm that your bid includes plans for some LUF expenditure in 2021-22

Yes

No

*Please ensure that you evidenced this in the financial case / profile.*

### 1b Gateway Criteria for private and third sector organisations in **Northern Ireland bids only**

(i) Please confirm that you have attached last two years of audited accounts.

Yes

No

(ii) **Northern Ireland bids only** Please provide evidence of the delivery team having experience of delivering two capital projects of similar size and scale in the last five years. (Limit 250 words)

## PART 2 EQUALITY AND DIVERSITY ANALYSIS

2a Please describe how equalities impacts of your proposal have been considered, the relevant affected groups based on protected characteristics, and any measures you propose to implement in response to these impacts. (500 words)

Promoting equality, challenging intolerance, embracing diversity and celebrating our achievements are at the core of our Rotherham Plan. This is reflected in the Levelling Up fund considerations as targeted investment in areas of deprivation and inequality. The game changing nature of our proposals means that inclusivity must be at the heart of everything we do and we recognise that exclusivity will mean our Levelling Up proposals have failed.

This proposal will aim to support the development of four well-established attractions in Rotherham. As outlined in Rotherham's Cultural Strategy, participation in cultural activities is associated with better health, better education and better jobs, but we also know that socioeconomic status can be a barrier to participation. For this reason, it was important to ensure that this proposal included opportunities to participate which are free – (such as within Rother Valley and Thrybergh Country Park.) Focussing on free activities also helps to make the offer more inclusive for a number of protected characteristic groups, due to the income inequality faced by BAME communities, disabled people and women in Rotherham.

Additionally, to ensure that the needs of protected characteristic groups are considered from the outset, targeted engagement will inform the design of all four cultural developments. Reaching all protected characteristic groups will be part of the engagement strategy, but it is anticipated that more detailed engagement may be required with certain groups. For example, disabled access is a vital equality consideration of these proposals. Similarly, in order for cultural attractions to be considered age-friendly, Age UK Rotherham have already fed back that older people require 'somewhere that's safe, somewhere to sit and somewhere to go to the toilet.' Continuing to work with communities to build these considerations into the designs will be an integral part of delivery.

Rotherham also has a legacy of using culture as a way of celebrating diversity in the borough, promoting dialogue and bringing communities together. Through the plans for all four attractions, there will be a focus on community cohesion

Another part of this proposal is focussed on skills development within hospitality and leisure. Whilst the Skills and Talent Hub package will be open to all groups, there is an opportunity to use this project to engage those who are furthest from the labour market, for example, those with disabilities or long-term conditions. Building on learning from other projects, such as Working Win and the Pathways Programme, we will explore opportunities to engage these groups, as well as people with other protected characteristics, with the opportunities for skill development through the hub.

When authorities submit a bid for funding to the UKG, as part of the Government's commitment to greater openness in the public sector under the Freedom of Information Act 2000 and the Environmental Information Regulations 2004, they must also publish a version excluding any commercially sensitive information on their own website within five working days of the announcement of successful bids by UKG. UKG reserves the right to deem the bid as non-compliant if this is not adhered to.

Please specify the weblink where this bid will be published: [Levelling Up Fund – Rotherham Metropolitan Borough Council](#)

### PART 3 BID SUMMARY

3a Please specify the type of bid you are submitting

Single Bid (one project)

Package Bid (up to 3 multiple complimentary projects)

3b Please provide an overview of the bid proposal. Where bids have multiple components (package bids) you should clearly explain how the component elements are aligned with each other and represent a coherent set of interventions (Limit 500 words).

The Levelling Up Fund aims to invest in cultural assets to rejuvenate places and assist in the retention and growth of a highly skilled workforce. Rotherham's towns and villages have suffered from economic decline following the demise of the coal, steel and manufacturing industries throughout the 1980s and 90s.

Rotherham set out its ambition for new economic growth in 'The Rotherham Plan 2025' stating:

"By focusing on our strengths - for example our expertise in engineering and manufacturing and the hidden gems and green spaces - we will create a positive Rotherham story: one that sells the place to everyone who may want to live, work, visit or invest here."

Recent years have seen success in the diversification of the manufacturing sector to high-end advanced manufacturing attracting the likes of Boeing and McLaren to Rotherham, and developing high value jobs and skills. To deliver the ambition set out in the Rotherham Plan 2025 further diversification is needed to develop new sectors and address the lack of economic resilience, building opportunities for inclusive growth and levelling up the town with its counterparts across the city region and the wider northern context.

This LUF bid aims to build a new Leisure industry that responds to the challenges of economic recovery and health and well-being. It brings together a package in two parts which will kickstart the leisure and visitor economy, drive inclusive growth and new job creation at the heart of communities across the borough, celebrate the hidden gems and green spaces that are unique to Rotherham's heritage, and reposition the town as a new leisure destination.

Our bid is a package bid focusing on two key projects;

Firstly, the Major Attractions package will focus on four well established attractions to fast track their development and build new revenue models to unlock future investment. To the north, Grade I Listed Wentworth Woodhouse will transform its Riding School and Stables to create new hospitality and visitor centres as part of its £130m masterplan to bring new life to one of the country's finest and largest historic houses. Also in the northern part of the borough, Thrybergh Country Park will embark on the first stage delivery of its masterplan focused on outdoor education and wellbeing unlocking the potential of this beautiful and tranquil country park with the creation of a new destination waterside café.

Close to the Town Centre, Magna, one of only two remaining Millennium Commissions, will create a suite of new exhibitions in its cavernous former steel works, which will focus on science, nature and natural materials. In the south of the borough, Rother Valley Country Park is nestled at the apex of Rotherham, Sheffield and Chesterfield providing a natural gateway to adventure and exploration. The site will embark on the first stages of a new masterplan focused on physical activity and adventure creating new hospitality and play facilities.

Secondly, The Skills & Talent Hubs package will underpin the development of these four major attractions through the creation of a new Skills Village at Gullivers Resort focusing on training, development, and accreditation within the hospitality and leisure sector. Bridging the gap between school and employment, Maltby Academy Trust will invest in the redevelopment of the former Maltby Grammar School to create an incubator space for training, apprenticeships, and start up support in the leisure and hospitality sectors.

3c Please set out the value of capital grant being requested from UK Government (UKG) (£). This should align with the financial case:	£19,990,000	
3d Please specify the proportion of funding requested for each of the Fund's three investment themes	Regeneration and town centre	%
	Cultural	100%
	Transport	%

## PART 4 STRATEGIC FIT

### 4.1 Member of Parliament Endorsement (GB Only)

See technical note section 5 for Role of MP in bidding and Table 1 for further guidance.

4.1a Have any MPs formally endorsed this bid? If so confirm name and constituency. Please ensure you have attached the MP's endorsement letter.

Yes

No

See Appendix 1. The three Rotherham MPs have given their support for all three Rotherham LUF bids. John Healey MP for Wentworth and Dearne endorses the Leisure Economy bid.

### 4.2 Stakeholder Engagement and Support

See technical note Table 1 for further guidance.

4.2a Describe what engagement you have undertaken with local stakeholders and the community (communities, civic society, private sector and local businesses) to inform your bid and what support you have from them. (Limit 500 words)

Extensive customer and audience research and consultation has taken place across Rother Valley Country Park and Thrybergh Country Park. Both operations undertake a biennial survey of existing park users building a profile of existing user habits and preferences and providing feedback and consultation on future developments. In Spring 2020, QA Research was commissioned to undertake detailed visitor surveys with a focus on both regular visitors and those who do not currently frequent either park with more than 400 in depth consultations completed.

The headline findings for Rother Valley Country Park include:

- More than two thirds of its current audience visit the park for two hours or more
- The main attractions at the site are walking (84%), café (42%), play (22%), and cycling (17%)
- The main services currently accessed at the site are the café (57%), ice cream van (40%), retail (36%), activity centre (14%), and cycling (12%)
- Current satisfaction levels report 85% at average or better
- When asked what additional facilities and investment customers would prioritise, the following was recorded; new café facilities (81%), events and seasonal activities (80%), exhibition spaces (73%), additional retail (60%), and more children's activities (46%).

The headline findings for Thrybergh Country Park include:

- The majority (43%) stay at the park for two hours but there is a higher than average proportion of visitors who use the park for the full day (more than three hours – 21%)
- The main attraction at the site currently is walking (88%), followed by café (31%), and play (7%)
- Current satisfaction levels report 83% at average or better

- When asked what additional facilities and investment customers would prioritise, the following was recorded; new café (64%), events and seasonal activities (58%), and more children’s activities (46%).
- The biennial surveys shows a bias towards an audience of 55+ (65%) but when asked the main areas of interest and improvement children’s activities and play was ranked highest (75%) suggesting a family market.

#### Magna

Magna commissions generic visitor surveys every two years, of interest was the need for more and better interactive exhibits, low lighting levels, wayfinding, café food range, broken exhibits and lack of activity. These things were barriers to attracting more visitors.

#### Wentworth

The masterplanning exercise undertaken by Wentworth Woodhouse Preservation Trust in 2018 involved a number of stakeholder interviews and public consultation events. Over 1,000 individuals took the time to respond to an online survey about the plans for the site. The overwhelming response to the exercise was one of support for the Trust and for the regeneration plans including the Stables and Riding School.

#### Skills Village

As part of the planning process a full consultation was undertaken with local stakeholders, communities, schools, colleges and local businesses.

4.2b Are any aspects of your proposal controversial or not supported by the whole community? Please provide a brief summary, including any campaigns or particular groups in support or opposition? (Limit 250 words)

There are no objections to the proposals put forward.

The partner organisations proposing projects for LUF hold long term relationships with the Council. Letters of support from each partner can be found in Appendix 2

Further support for this bid is provided by each of the Rotherham Borough MPs. Letters of support can be seen in Appendix 1.

An additional letter of support from Barnsley Metropolitan Borough Council is at Appendix 7 which confirms the relevancy of this application and in particular the Wentworth Woodhouse project, to their own LUF bid for Elsecar.

4.2c Where the bidding local authority does not have the statutory responsibility for the delivery of projects, have you appended a letter from the responsible authority or body confirming their support?

- Yes  
 No  
 N/A

For Northern Ireland transport bids, have you appended a letter of support from the relevant district council

- Yes  
 No



N/A

### 4.3 The Case for Investment

See technical note Table 1 for further guidance.

4.3a Please provide evidence of the local challenges/barriers to growth and context that the bid is seeking to respond to. (Limit 500 words)

The effects of economic decline due to the loss of core industries such as coal and steel over the last four decades have had a startling cumulative impact on the health and wealth inequalities experienced by communities across the Rotherham borough.

The town consistently ranks above the national average in indicators of deprivation, poverty, and health inequalities which is highlighted across the following areas:

- Gross weekly pay in Rotherham is 5% lower than the national average for men and a startling 19% lower than the national average among women.
- In 2019 there were 16,000 workless households in Rotherham, a total of 19% of the Borough.
- Participation in Rotherham is currently 10% below the national average with 51.3% of people interviewed in the Active Lives Survey undertaking more than 150 minutes of physical activity per week, compared to the national average of 61.8%.
- In the same survey 37% of people in Rotherham reported being inactive (less than 30 minutes per week) against the national average of 25.7%.

Set against this backdrop of health and wealth inequalities the 'Unlocking the potential of culture, arts and heritage in South Yorkshire' report commissioned by Sheffield City Region in 2020 highlighted the opportunity of investing in the leisure and visitor economy and the likely economic benefits including:

- substantial direct and indirect contribution to the local economy (£200m GVA and 6,400 jobs)
- wider economic and social benefits including supporting tourism, creative industries, health, education, community, and individual wellbeing. These contribute at least a further £170m to the local economy and £1.2bn in individual wellbeing
- positive impacts on wellbeing from participation, quantified at between £1,000 and £2,000 per person per year.
- generation of personal wellbeing benefits of around £1.2bn annually for residents across South Yorkshire
- annual cost savings to the NHS of £10m or more.

This twin-track bid aims to invest in the capital development of four major visitor attractions alongside developing skills and talent to ensure that the economic benefits of these developments are felt locally. This bid seeks to fast track the development of a new economy for Rotherham, creating new employment opportunities through inclusive growth, building a high-value visitor economy that is evenly distributed across the borough building a market for overnight stays, and driving up participation levels across local communities reducing health inequalities.

Through addressing these legacies of decline and creating a diversified economy this bid will enable Rotherham to level up with its nearest neighbours and benefit from a cross-regional and northern tourism economy.

4.3b Explain why Government investment is needed (what is the market failure)? (Limit 250 words)

Encompassing tourism, hospitality, leisure and entertainment, the creative and cultural sector is diverse in the Sheffield City Region (SCR), The Strategic Economic Plan (SEP) designating the sector as a 'high growth' industry, reflected by creative employment in SCR growing by 44% compared to 8% across all industries between 2009-2019.

Clearly there are opportunities for further growth but the majority of creative and cultural businesses in the SCR are overwhelmingly small (turnover less than £50,000 or less than 10 employees). Only 10% of the 3,000 creative and cultural jobs are based within Rotherham. The key to growth is investing in mid-scale organisational capacity to attract major funding and stimulate development within the local creative economy. However, funding in Rotherham remains low, receiving only 6% of Arts Council investment in the SCR. The SCR cultural sector funding gap is £10m less than the national average.

Lack of funding and lack of a skilled workforce additionally restricts growth in the sector. Despite being proven to yield high productivity ('The Economic Value of Arts & Culture in the North - 2019' placed Barnsley, Doncaster and Rotherham highest in the region for GVA per FTE), the fragmented approach to skills and training, creating pathways to progression and growth and development in the sector, has seen Rotherham fall behind its counterparts with only 10% of the regional workforce.

4.3c Please set out a clear explanation on what you are proposing to invest in and why the proposed interventions in the bid will address those challenges and barriers with evidence to support that explanation. As part of this, we would expect to understand the rationale for the location. (Limit 500 words)

The LUF will contribute to the development of a new industry for Rotherham, a leisure, tourism, heritage and hospitality focussed industry backed up by a comprehensive skills and training offer to create new and exciting employment opportunities for the entire Borough.

### **Major attractions**

Redevelopment of Rother Valley Country Park will provide a Pavilion Café overlooking the lake with green amenity space alongside event space. The 'village centre' will be refurbished and enhanced with a glazed link to include an educational centre and the restoration of an 18<sup>th</sup> century mill. This facility will also be supplemented by another green amenity space adjoining the village centre to the south. To the north the toy railway station will be enhanced through the replacement of the existing service yard with a new green. The existing adventure playground will be extended and supplemented by an additional play facility to the eastern side of the lake with a climbing forest.

To enhance the offer at Thrybergh Country Park the existing café facility will be replaced with a larger pavilion alongside an external terrace providing additional outdoor seating, with expansive views across the reservoir. A new car park will

provide an additional 152 spaces allowing more visitors to enjoy this facility, supplemented by 6 additional accessible bays at the water's edge.

Wentworth proposals will bring the old stables into use through the creation of a kitchen to service all parts of the site including a new café. Creating a new venue on site with the additional promise of skills training and development.

Magna will create an exciting new exhibition area. Bioengineering, biomaterials, nanostructures, sports and food engineering will all be integrated into the existing galleries: Air, Earth, Fire and Water. As well as introducing a vehicle for life sciences, the new areas will intentionally contrast with visions of hot-forged smelting, which reinforce visitors' traditional perceptions of engineering. All framed around the creation of a 'vision of now, a vision of the future, a vision in which they have a role to play'.

### Skills

Maltby Academy Trust will redevelop the old Grammar School building to create a flexible facility capable of:

- creating inter linked spaces that will aid the transition of young people from school to training to employment,
- integrating support services for training and apprenticeships and providing financially accessible spaces for start-up businesses
- utilising the resources of the Maltby Learning Trust to support community based lifelong learning for adults

Gullivers Skills Village will provide a wide range of opportunities through a multi-partnership approach for children, young people, and adults to gain the appropriate skills, experience, and knowledge to access the current and future opportunities. The innovative setting will give people the opportunity to experience real world work experiences.

4.3d For Transport Bids: Have you provided an Option Assessment Report (OAR)	<input type="checkbox"/> Yes
	<input type="checkbox"/> No

4.3e Please explain how you will deliver the outputs and confirm how results are likely to flow from the interventions. This should be demonstrated through a well-evidenced *Theory of Change*. Further guidance on producing a Theory of Change can be found within [HM Treasury's Magenta Book](#) (page 24, section 2.2.1) and [MHCLG's appraisal guidance](#). (Limit 500 words)

The leisure economy is identified as an emerging industry which has the potential to make a major contribution to the Rotherham economy and the life chances and well-being of the Borough's population.

Levelling up aims to invest in cultural assets in recognition of their role in producing positive social and economic outcomes. Our aims for Levelling Up are the same and the interventions proposed- investment in our major attractions and the skills needed to support this emerging industry - will do just that.

The interventions proposed will be facilitated by the Levelling Up to a total of £19,990,000. Investment from the private sector of £3,174,228 will be leveraged to bring about the required changes.

The interventions proposed will achieve:

- *Delivery of new public spaces:* Both Rother Valley and Thrybergh Country Parks provide a significant amount of publicly accessible open space. The LUF will specifically deliver 5,250sqm across both sites
- *New, upgraded or protected parks or gardens and new upgraded or protected community hubs, spaces or assets where this links to local inclusive growth:* The entirety of Rother Valley and Thrybergh Country Parks will benefit from the LUF investment. Specifically, 1,022sqm of café, 5,250sqm of open space, and 370sqm education centre will be provided.
- *New, upgraded or protected prominent landmarks, historical buildings:* Wentworth Woodhouse is a nationally significant, Grade I listed landmark. The LUF will enable the redevelopment of 800sqm of this building via the delivery of The Stables. Maltby Grammar school is considered a significant landmark in the local area, its refurbishment will bring back into use a total of 945sqm of historical buildings.
- *New, upgraded or protected community hubs, spaces or assets where this links to local inclusive growth:* The totality of this bid ensures community spaces and assets are protected providing a total of 5,560sqm of new and upgraded cultural assets.

#### 4.4 Alignment with the local and national context

See technical note Table 1 for further guidance.

4.4a Explain how your bid aligns to and supports relevant local strategies (such as Local Plans, local economic strategies or Local Transport Plans) and local objectives for investment, improving infrastructure and levelling up. (Limit 500 words)

The Rotherham Culture strategy provides the overarching direction for our LUF proposals, that is, 'to enable everyone in Rotherham to get active, get creative and get outdoors, more often'

To do this the Council will;

- Care for our natural environment
- Conserve our built heritage
- Create better space to make, present and experience arts

Specifically, by supporting Wentworth Woodhouse, Gullivers and Rother Valley Country Park.

The Sheffield City Region (SCR) Strategic Economic Plan has three overarching policy objectives, two of which speak directly to our LUF plans;

- Growing the economy for all
- Ensuring everyone has the opportunity to contribute to and benefit from economic growth

It also set a regional target of increasing cultural engagement by closing the gap between regional and national participation in cultural activity.

The Rotherham Economic Growth Plan (2015 – 25) vision aims to make Rotherham a place where;

- Business will flourish and grow
- The population is highly skilled and enterprising
- The necessary infrastructure...is provided to support economic growth

The SCR report Unlocking the Potential of Culture, Arts and Heritage in South Yorkshire states; ‘Successful places are not just defined by their economic output, they have a high quality of life, creative vibrancy and a sense of cultural identity. Culture, Art and Heritage should therefore be at the heart of any growth agenda. It is a source of direct growth and jobs - but also a source of innovation and skills. The sector makes South Yorkshire a great place to live, work, visit, and invest; it attracts talent, supports the visitor economy, and drives investment into vital cultural assets’

The Rotherham Plan 2025 supports the interventions proposed, as follows; “Rotherham has a wealth of green space across the borough, in the form of country and urban parks, nature reserves, woodlands and playing fields. Although used well in some areas, others offer an often untapped resource within communities”

In support of our development of skills and job creation the Rotherham Plan 2025 places an emphasis on ensuring major local organisations focus on spending their money in a way that creates opportunities for local people and businesses.

It also aims to achieve;

- An increase in higher level skills (level 4 and above)
- More young people able to achieve their potential through education, employment and training
- Fewer people claiming out of work benefits in the most deprived areas

The Rotherham Joint Health & Wellbeing Strategy 2025 identifies the health inequalities across the Borough and aims to ensure ‘all Rotherham people enjoy the best mental health and wellbeing and have a good quality of life’ by increasing the opportunity for people of all ages to participate in culture, leisure, sport and green space activity.

4.4b Explain how the bid aligns to and supports the UK Government policy objectives, legal and statutory commitments, such as delivering Net Zero carbon emissions and improving air quality. Bids for transport projects in particular should clearly explain their carbon benefits. (Limit 250 words)

The Built Environment contributes to approximately 30% of the UK’s total carbon footprint. In response, each of the developments proposed will aim to achieve as close as possible the UK Governments commitment to reduce CO2 emissions to 80% of 1990 levels, due by 2050, through a programme of CO2 emission reductions.

To achieve this, we will set out with the principle of designing to be Zero energy/carbon in construction with Zero embodied energy/carbon in operation. The schemes will also aim to be climate adaptable, maintaining their desired performance in the event of climate change in future decades.

These projects will adopt the targets and approach set out by the RIBA in their 2030 Sustainable Outcomes Guide and follow the UK Green Building Council's 5-point strategy for achieving where possible a set of net-zero carbon buildings:

1. Establish Net Zero Carbon Scope/Brief
2. Reduce Construction Impacts (embodied carbon)
3. Reduce Operational Energy Use (operational carbon)
4. Increase Renewable Energy Supply
5. Offset any remaining carbon

Changes to the UK building regulations will shortly be implemented following consultation on Part L (conservation of fuel and power) and Part F (ventilation) earlier this year, which we see as a key pathway to reducing carbon, considering the future standards due to be implemented by 2025. Through a fabric first approach we aim to exceed the approaching 2021 performance requirements. All proposed schemes will also assess the viability for onsite renewable generation, to support our goal of designing these projects to be zero carbon ready in operation.

4.4c Where applicable explain how the bid complements / or aligns to and supports other investments from different funding streams. (Limit 250 words)

A joint bid was recently submitted to the UK Community Renewal Fund which saw a project between Rotherham's largest cultural organisations (including Wentworth Woodhouse Preservation Trust, Magna, Gullivers and the Council) seeking funding of £1.9m to provide the opportunity for 35 people to join a 'host' organisation and access training and skills focussed on the cultural industries.

Wentworth Woodhouse Preservation Trust has ambitious plans to a total of £130m over two decades to develop the entire Wentworth estate. This was kick-started by an award of £7.6 million in 2016. Development funding for the Stables west range has already been secured. This is part of a larger scheme that includes the Stables south range, adjacent Ostlers House and Riding School and the Camellia House in the gardens. Development phase funding awards totalling £1,713,400 has already been secured.

Magna sits within Templeborough, a priority area for investment. Funding has recently been allocated to provide a new tram/train stop to the rear of the site. Additionally, a sum of £6.5m is identified in the recently secured Town Deal to bring forward new development and a gateway around the Magna building.

The first phase of Gulliver's development totalled £7.5m, of this £1.1m was provided by the MCA in the form of a loan and £400,000 grant.

4.4d Please explain how the bid aligns to and supports the Government's expectation that all local road projects will deliver or improve cycling and walking infrastructure and include bus priority measures (unless it can be shown that there is little or no need to do so). Cycling elements of proposals should follow the Government's cycling design guidance which sets out the standards required. (Limit 250 words)

N/A



## PART 5 VALUE FOR MONEY

### 5.1 Appropriateness of data sources and evidence

See technical note Annex B and Table 1 for further guidance.

All costs and benefits must be compliant or in line with [HMT's Green Book](#), [DfT Transport Analysis Guidance](#) and [MHCLG Appraisal Guidance](#).

5.1a Please use up to date evidence to demonstrate the scale and significance of local problems and issues. (Limit 250 words)

The Rotherham economy faces various issues linked to the historic dependency of the area on sectors such as mining, steel-making and other heavy industries. The decline of these industries has resulted in a shortage of employment opportunities, including in service sectors.

The shortage of employment opportunity is exemplified by Rotherham's job density statistic. Job density is defined by the ONS as the ratio of total jobs found in an area divided by the area's resident working age population. In the case of Rotherham, the job density ratio is just 0.69, compared to a region-wide average of 0.81 and a GB average of 0.89. This means that Rotherham has a deficit of around 19,000 jobs compared to the regional average alone.

The jobs deficit in Rotherham is manifested in several further indicators, such as much higher proportion of economic inactivity and workless households compared to regional averages.

However, a major opportunity exists to address the local jobs deficit. This opportunity is to grow substantially the leisure economy of the area by harnessing in full the latent potential of a number of important existing and recently developed visitor destinations, such as Gulliver's Valley, Magna, and Wentworth Woodhouse.

Currently, Rotherham suffers a deficit of employment in the leisure economy compared to benchmarks amounting to around 2,200 jobs. Capitalising in full on the opportunity to develop the leisure and tourism economy has the potential to create substantial new employment both directly and indirectly through off-site visitor spending and through local procurement and supply chain effects.

5.1b Bids should demonstrate the quality assurance of data analysis and evidence for explaining the scale and significance of local problems and issues. Please demonstrate how any data, surveys and evidence is robust, up to date and unbiased. (Limit 500 words)

Various data sources have been used to contextualise the scale and significance of local problems, issues, and opportunities relevant to the leisure and visitor economy of Rotherham. These include the following:

- Data on employment in sectors most relevant to the leisure and visitor economy at a Borough-wide level are obtained from the ONS Business Register and Employment Survey (BRES). As of September 2019, there were 98,000 employee jobs located in Rotherham, with just 6,000 (6.1%)

found in Accommodation & food services, and 1,750 (1.8%) found in Arts, Entertainment and Recreation services. Both these proportions are significantly lower than regional and national benchmarks.

- Data on job density statistics, trends, and benchmarks has been obtained from the ONS Job Density data series.
- Data on local labour market performance including unemployment and worklessness is sourced from the ONS/NOMIS for the Rotherham MBC area as a whole. Issues that are particularly relevant to the strategy for the Rotherham leisure economy are both linked to a deficit of local employment opportunity, i.e.:
  - Around 16,000 households (19.2%) in Rotherham are workless, compared to a regional average of 15.0% and a national average of 13.9%.
  - There are estimated to be 9,000 currently economically inactive working age residents of Rotherham who would like to work, which is a rate of 28.4%. This is a significantly higher proportion compared to regional (21.1%) and national (22.6%) averages.
- Data on relevant trends affecting national and regional tourism and day visitor markets have been extracted from research studies and data commissioned by Visit Britain and Visit England.
- Data specific to the attractions for which are proposed to be included in the LUF intervention strategy for the Leisure Economy has been provided by the operators of those attractions. For example, data covering on current and expected future levels of visitors, on-site visitor expenditure and other sources of income have been provided for each attraction.
- Data has also been provided by the individual attractions that has enabled estimation of direct and wider benefits linked to proposed LUF intervention. These include areas of new floorspace by use type, details of new public realm areas (where relevant), estimates of implications for staffing levels, etc.

5.1c Please demonstrate that data and evidence chosen is appropriate to the area of influence of the interventions. (Limit 250 words)

The Leisure economy strategy is relevant to the Borough as a whole, as it involves support for six projects that are located in different locations. Given that the rationale for intervention is predicated in part on addressing the deficit in local job opportunities, the relevant area for assessment of wider job creation opportunities is also the local labour market as a whole.

In assessing the potential impact of LUF interventions, much of the data and evidence relevant to the assessment is specific to individual projects and project site areas. For example, the potential for direct job creation effects for some of the projects is linked to size (i.e., sqm of floorspace) of the new visitor facilities that are intended to be provided by LUF resources.

However, there are several types of benefits – relevant to certain projects only – where the area of intervention extends slightly outside this boundary. These are as follows:



- Crime reduction: in line with the guidance provided by MHCLG for the FHSF programme, the area of influence for reduced crime expected to be generated by proposed interventions extends to 1 mile from the centre of the LUF intervention area.
- Land Value Uplift in the wider area: the area of influence for LVU in the wider area – for both residential and commercial properties – includes a 250 metre buffer beyond the red line edge of the LUF intervention area.

## 5.2 Effectiveness of proposal in addressing problems

5.2a Please provide analysis and evidence to demonstrate how the proposal will address existing or anticipated future problems. Quantifiable impacts should usually be forecasted using a suitable model. (Limit 500 words)

The projects proposed for support via the LUF and co-funding will help to address the opportunity that exists to grow substantially the size and value of the visitor economy of Rotherham, thereby creating new direct and supply chain business opportunities and create new jobs.

It will do this by facilitating investment to visitor attractions across a range of visitor and leisure market segments, such as families and younger children, science & technology, heritage, and the natural environment.

The inclusion of a substantial skills development component in the form of Skills City and the Maltby Academy also provides a mechanism to ensure that a high proportion of new employment opportunities in the leisure and visitor economy will benefit local people, especially from among those who are returning to the workforce from a period of worklessness or economic inactivity. This expectation is featured in the assessment of benefits in terms of the expectation of a minimum of 10% of jobs being taken by new or re-entrants to the labour market.

Impacts on Amenity Value have been modelled using the areas of new public realm identified through the masterplan process and site-specific outputs and unit values identified by the MHCLG Appraisal Guide using a 2021 price base.

Impacts on wider area land value uplift have mainly focused on the expected effect on residential land values in communities that are close to projects where there will be investment in new or enhanced public realm, such as at Maltby and in the vicinity of the country parks.

A further source of benefit is an expected reduction in levels of crime and anti-social behaviour in the areas surrounding project interventions. Crime reduction benefits have been estimated using the methodology provided by MHCLG in the FHSF bidding process.

The projects can also be expected to generate additional public revenues as a result of the development of commercial floorspace liable for Business Rates, such

as at Skills City. Estimates of future revenues have been estimated using floorspace areas and levels of Rateable Value applying to similar types of properties in the local area.

In terms of quantifying impacts, a spreadsheet model has been developed that yields a wide range of quantifiable outputs, many of which are capable of monetisation for inclusion in the BCR calculation. Further details of this model are provided in the response to section 5.2b below.

5.2b Please describe the robustness of the forecast assumptions, methodology and model outputs. Key factors to be covered include the quality of the analysis or model (in terms of its accuracy and functionality) (Limit 500 words)

An economic impact model LUF intervention has been constructed as a discounted cash flow of costs and benefits over a 30-year appraisal period using a 2021 price base. However, in accordance with MHCLG guidance, the period of duration for some types of annualised benefits covered in the model (such as crime reduction, amenity value, jobs made more accessible) are only included for a 10-year period.

A series of project-related benefits have been included in the model, in each case using methodologies consistent with established best practice and Government guidance.

- Gross and net floorspace areas derived from commercial development expected to occur in the strategy intervention area have been used as the starting point to estimate gross employment creation potential. The gross job numbers from the model have in turn been used to produce monetary estimates of '*jobs made more accessible*' following the proposed intervention, using the method recommended by MHCLG.
- The incorporation of skills development infrastructure in the form of Skills City and the Maltby Academy reinforces the importance of ensuring that a high proportion of new job opportunities at the attractions (and in the wider local supply chain) benefit local people, especially those entering or re-entering the workforce from periods of worklessness or economic inactivity.
- The model also quantifies benefits such as Wider Area LVU covering existing commercial and residential properties located close to the attractions, utilising a methodology recommended by MHCLG as part of the FHSF programme.
- The model also covers estimated benefits associated with expected reduced levels of crime and anti-social behaviour. Assumption regarding displacement, attribution, value of benefits and duration of effects have all been sourced from MHCLG guidance provided during the FHSF bid process.
- Enhanced amenity value from proposed new or enhanced public realm has been quantified using the methodology recommended by the MHCLG Appraisal Guide.

### 5.3 Economic costs of proposal

5.3a Please explain the economic costs of the bid. Costs should be consistent with the costs in the financial case, but adjusted for the economic case. This should include but not be limited to providing evidence of costs having been adjusted to an appropriate base year and that inflation has been included or taken into account. In addition, please provide detail that cost risks and uncertainty have been considered and adequately quantified. Optimism bias must also be included in the cost estimates in the economic case. (Limit 500 words)

Financial costings for projects included within the bid have been developed by Rotherham MBC and stakeholders supported by a team of experienced consultants with expertise in engineering, architecture, and urban design.

Project costings assume a single phase of construction, and are based on cost information obtained from BCIS, Spons, and in-house benchmarks.

Cost estimates for the proposed civil engineering works excludes allowances for VAT, NHBC Insurance, Planning Fees and pre-contract Professional Fees.

Costs have been developed in present day terms assuming a mid-point of construction of Q2 2023. The costings take into account expected levels of building cost inflation over the expected development period.

The profiling of project costs in the Economic Case is consistent with those set out in the Financial Case: this profiling has been developed by the Council based on advice received from the masterplanning team, with inputs also from key local stakeholders.

Proposed project expenditure by project is as follows (totals may not sum exactly due to rounding of decimals):

Project element	Cost £m (undiscounted)	PV at 3.5% (£m)
Rother Valley Country Park	5.50	5.26
Thrybergh Country Park	2.50	2.39
Wentworth Woodhouse	5.10	4.88
Magna	2.10	2.01
Gulliver's Skills Village	1.60	1.53
Maltby Skills Academy	6.35	6.08
<b>Totals</b>	<b>23.15</b>	<b>22.15</b>

Overall project costs are estimated to amount to £23.15 million.

Future project costs have been converted to a present value using a discount rate of 3.5% per annum in accordance with the guidance found in the Green Book and MHCLG Appraisal Guide.

When discounting is applied, the Present Value of these costs is estimated to amount to £22.15 million.

Optimism bias has also been factored into the assessment. Given that the proposed project has been costed in detail by appropriately qualified experts, an additional allowance adjustment for optimism bias amounting to 15% of expected project costs requiring public sector funding (LUF plus other public sector co-funding) has been made.

#### 5.4 Analysis of monetised costs and benefits

5.4a Please describe how the economic benefits have been estimated. These must be categorised according to different impact. Depending on the nature of intervention, there could be land value uplift, air quality benefits, reduce journey times, support economic growth, support employment, or reduce carbon emissions. (Limit 750 words)

The following categories of economic benefits have been included in the estimation of VFM associated with the Leisure economy strategy for Rotherham supported by the LUF.

**Direct Land Value Uplift.** The extent of the expected LVU associated with Country Park, Gulliver's Valley and Maltby projects have been estimated using a methodology consistent with the MHCLG Appraisal Guide based on current site values, expected development costs, and anticipated asset values following redevelopment. The scale of LVU anticipated is £10.703 million. This is equivalent to £9.654 million in PV terms.

**Wider Area Land Value Uplift – residential properties.** By providing enhanced public realm the strategy can be expected to generate positive spill over effects on the value of nearby residential properties, e.g., near to Rother Valley Country Park and at Maltby. The expected scale of this effect in gross terms is a 5% uplift in residential land value within the town centre and buffer. However, a 40% attribution rate is also assumed (a typical level found in Webtag), as well as a Displacement rate of 25%. The overall scale of wider area residential property LVU anticipated is £2.655 million p.a. for 10 years. The cumulative value of this benefit is £19.916 million in PV terms.

**Wider Area LVU – commercial properties.** The potential for wider area uplift for commercial properties in Maltby town centre (only) has been assessed, using data on current values and numbers of properties sourced from Co-Star and EGI. The overall scale of wider area commercial property LVU anticipated is £0.571 million p.a. for 10 years. The cumulative value is £4.280 million in PV terms.

**Public amenity value.** The benefit associated with amenity enhancements from improved public realm have been estimated by calculating the areas expected to benefit from improved public realm in the country parks and in Maltby town centre, and converting this area to a financial value using a method consistent with the MHCLG Appraisal Guide. This amounts to a current value of approximately £4.261 million per annum. The cumulative value is £36.679 million in PV terms.

**Crime and anti-social behaviour.** Benefits associated with the potential for reduced levels of crime has been estimated in a manner consistent with MHCLG guidance. The method used includes standard assumptions for annual reduction (1%), displacement (75%) and the average cost of crime (based on the value identified by MHCL in the FHSF guidance, updated to 2021 prices). This methodology results in an annual reduction in crime worth around £104,000 per annum in current terms occurring over 10 years. The cumulative value is £0.781 million in PV terms.

**Jobs made more accessible.** The value of jobs made more accessible has been calculated using a methodology fully consistent with MHCLG guidance issued for the FHSF. The starting point is the estimation of the potential for gross jobs associated with new commercial and leisure floorspace expected to be delivered by relevant project elements, and/or using estimates for new staffing supplied by the individual attractions. Gross job estimated have been calculated using floorspace densities provided by the Homes England *Employment Density* guide. The result of this estimation is a gross direct job count of 131. Of these, 10% are assumed to be taken by labour market entrants or re-entrants, whilst the welfare impact is assumed to be 40% (based on Webtag guidance). The annual value generated by the jobs is estimated using ONS average GVA per worker data (2018) updated to current prices using HMT GDP price deflators. This methodology results in an annual value of jobs made accessible worth £0.239 million per annum occurring over 10 years. The cumulative value is £1.790 million in PV terms.

**Other public revenues.** The LUF intervention is expected to yield significant benefits in the form of additional sources of ongoing revenue, in particular Business Rate income generated from new commercial floorspace. The future estimates of these revenue streams in cumulative terms amounts to around £0.376 million per annum, based on average values for Rateable Value for the relevant categories. The cumulative value of this benefit is £5.865 million in PV terms.

**Carbon savings.** Significant reductions in annual carbon dioxide associated with heating and lighting at the Magna attraction would be achieved through the introduction of new heating and lighting systems that would be expected to save some 320,000 KWH of energy per annum. This carbon saving has been converted into a financial value using values published by BEIS converted to 2021 prices using HMT GDP price deflators. The cumulative value of this benefit is equivalent to £2.713 million in PV terms.

5.4b Please complete Tab A and B on the **appended excel spreadsheet** to demonstrate your:

Tab A - Discounted total costs by funding source (£m)

Tab B – Discounted benefits by category (£m)

## 5.5 Value for money of proposal

5.5a Please provide a summary of the overall Value for Money of the proposal. This should include reporting of Benefit Cost Ratios. If a Benefit Cost Ratio (BCR) has been estimated there should be a clear explanation of how this is estimated ie a methodology note. Benefit Cost Ratios should be calculated in a way that is consistent with [HMT's Green Book](#). For non-transport bids it should be consistent with [MHCLG's appraisal guidance](#). For bids requesting funding for transport projects this should be consistent with [DfT Transport Analysis Guidance](#). (Limit 500 words)

The overall value for money of the proposed intervention has been calculated in a way that is fully consistent with MHCLG requirements for regeneration programmes such as the Future High Street Fund and the Towns Fund. The formula used to calculate the BCR is as follows:

- (Present Value of expected Benefits minus Present Value of expected Private Sector Investment) divided by the Present Value of expected Public Sector Costs.

The estimation of the Present Value of expected Public Sector Costs includes an allowance for Optimism Bias, taking account of both LUF investment and public sector co-funding.

The following table provides the summary results of the proposed LUF intervention and associated strategy for the Leisure Economy.

**Rotherham Leisure Economy LUF Bid: Summary of costs and benefits**

	<b>Present Value, 2021/22 prices (£millions)</b>
<b>Benefits for BCR</b>	
Direct Land Value Uplift (LVU)	9.654
Wider area LVU – residential	19.916
Wider area LVU – commercial	4.280
Amenity value benefits	36.679
Crime reduction benefits	0.781
Benefits of jobs made more accessible	1.927
Additional public sector revenues	5.865
Carbon savings	2.713
<b>Total benefits for BCR</b>	<b>81.817</b>
LUF cost	19.122
Co-funding – public sector	1.318
<b>Total public sector cost (i.e., LUF + public sector co-funding)</b>	<b>20.440</b>
Optimism bias adjustment for public sector co-funding	3.066
<b>Overall public sector costs (i.e., LUF + public sector co-funding + optimism bias)</b>	<b>23.506</b>
Private sector costs	<b>1.706</b>
<b>BCR (PV Benefits – PV private sector costs)/(PV Public sector costs)</b>	<b>3.41</b>

Overall benefits have an estimated present value of £81.817 million, whilst overall public sector costs (including optimism bias) have an PV of £23.506 million.

Private sector costs are expected to amount to a PV of £1.706 million.

The overall BCR of the proposed intervention to develop the Rotherham Leisure Economy is therefore **3.41**.

The proposed intervention project is expected to generate a strong ratio of benefits compared to costs. The BCR for the project is calculated to be 3.41, which is substantially greater than the minimum ratio of 2.0 which is often used by Government as guide in public investment decision-making for infrastructure and regeneration projects.

On that basis, the proposed investment of LUF resources into the strategy to develop the Leisure Economy of Rotherham can be expected to generate a high level of value for money.

5.5b Please describe what other non-monetised impacts the bid will have, and provide a summary of how these have been assessed. (Limit 250 words)

Apart from the 130 or so direct jobs expected to be created at the attractions and skills projects themselves, the proposed interventions funded by LUF also have the potential to generate significant numbers of jobs elsewhere in the Rotherham economy through off-site expenditure effects.

The scale of opportunity for boosted offsite employment has been estimated using a local impact model, based on the expected numbers of additional visitors and estimates of average per visitor additional spending based on regional data published by Visit England.

When added together, the estimated number of first-round indirect jobs generated through additional local expenditure by visitors originating from outside the Rotherham area amounts to 160 jobs within 3 years, and 200 jobs within 6 years. These totals exclude additional local jobs supported through procurement and supply chain expenditure.

The generation of the estimated numbers of indirect jobs as set out above also has the potential to boost the generation of economic output (GVA) in the Rotherham economy in gross terms by approximately £3 million per annum within 3 years.

The construction phase of the intervention strategy also has the potential to support construction phase employment both directly and indirectly (i.e., through supply chain activity and construction workforce local expenditure). The number of direct jobs expected to be required to deliver the capital investment associated with the proposed LUF intervention in support of the Leisure Economy is expected to amount to 63 person years of employment.

5.5c Please provide a summary assessment of risks and uncertainties that could affect the overall Value for Money of the bid. (Limit 250 words)

The costings for the proposed interventions include appropriate allowances for contingency and project management resources to deliver efficient and effective management of the project.

Rotherham MBC has experience of delivering complex regeneration projects involving multiple partners and stakeholders. The Council also has sufficient project management resources in place to monitor project and programme progress, and to make adjustments if projects encounter unexpected difficulties or otherwise threat to not make expected levels or rates of progress.

A risk register covering the intervention strategy has been prepared as is appended to this bid at Appendix 4.

5.5d For transport bids, we would expect the [Appraisal Summary Table](#), to be completed to enable a full range of transport impacts to be considered. Other material supporting the assessment of the scheme described in this section should be appended to your bid.

## PART 6 DELIVERABILITY

### 6.1 Financial

See technical note Table 1 for further guidance.

6.1a Please summarise below your financial ask of the LUF, and what if any local and third party contributions have been secured (please note that a minimum local (public or private sector) contribution of 10% of the bid costs is encouraged). Please also note that a contribution will be expected from private sector stakeholders, such as developers, if they stand to benefit from a specific bid (Limit 250 words)

The total cost of the proposals put forward in this application total

Of this £19,990,000 is required from the Levelling Up fund.

The shortfall will be provided by the project partners. Of this £1,364,228 is now secured and the remainder £1,810,000 is yet to be secured.

Costs are broken down per projects as follows:

	<b>TOTAL PROJECT COST</b>	<b>LUF</b>	<b>Secured Match</b>	<b>Provisional match</b>
<b>Leisure Economy</b>				
Rother Valley	5,500,000	5,500,000		
Thrybergh	2,500,000	2,500,000		
Wentworth	5,100,000	4,600,000		510,000



Magna	2,100,000	1,890,000	210,000	
Gullivers Skills Village	1,600,000	1,000,000	300,000	300,000
Maltby Academy	6,354,228	4,500,000	854,228	1,000,000
<b>TOTAL</b>	<b>23,154,228</b>	<b>19,990,000</b>	<b>1,364,228</b>	<b>1,810,000</b>

6.1b Please also complete Tabs C and D in the **appended excel spreadsheet**, setting out details of the costs and spend profile at the project and bid level in the format requested within the excel sheet. The funding detail should be as accurate as possible as it will form the basis for funding agreements. Please note that we would expect all funding provided from the Fund to be spent by 31 March 2024, and, exceptionally, into 2024-25 for larger schemes.

See Appendix 6

6.1c Please confirm if the bid will be part funded through other third-party funding (public or private sector). If so, please include evidence (i.e. letters, contractual commitments) to show how any third-party contributions are being secured, the level of commitment and when they will become available. The UKG may accept the provision of land from third parties as part of the local contribution towards scheme costs. Where relevant, bidders should provide evidence in the form of an attached letter from an independent valuer to verify the true market value of the land.

Yes

No

6.1d Please explain what if any funding gaps there are, or what further work needs to be done to secure third party funding contributions. (Limit 250 words)

A total match of £3.1m is proposed. Of this £1.8m is not secured.

Partners have committed to securing this funding through a range of fund-raising mechanisms.

The partner's commitment is included in letters of support in Appendix 2

6.1e Please list any other funding applications you have made for this scheme or variants thereof and the outcome of these applications, including any reasons for rejection. (Limit 250 words)

£458,000 has been secured for the Wentworth development phase of the project.

6.1f Please provide information on margins and contingencies that have been allowed for and the rationale behind them. (Limit 250 words)

The costs included within this bid incorporate the following margins and contingencies;

- Main contractor overhead and profits incorporated at 6% - This is aligned with current market conditions based upon experience of recent tender returns for work of a similar nature. This has been applied to the construction costs including preliminaries.
- Risk allowance - This has been incorporated into the costs at 10% applied to the construction costs. The risk allowance is considered reasonable and proportionate to the current project stage/ status.

6.1g Please set out below, what the main financial risks are and how they will be mitigated, including how cost overruns will be dealt with and shared between non-UKG funding partners. (you should cross refer to the Risk Register). (Limit 500 words)

An initial risk register has been developed and included within this bid. Collaboratively, with input from the whole team, the risk register will be further developed as the project progresses and this will evolve into a detailed risk register identifying risks and mitigation strategies relating to cost, quality and programme. The risk allowance included within the costs presented will be integrated into the risk management processes as the design develops through the RIBA work stages including throughout the construction period. The risk register and risk allowances will be continually monitored and revisited as the project progresses. This will ensure the risk allowances are proactively managed alongside the risk register throughout the project lifecycle.

## 6.2 Commercial

See technical note Section 4 and Table 1 for further guidance.

6.2a Please summarise your commercial structure, risk allocation and procurement strategy which sets out the rationale for the strategy selected and other options considered and discounted. The procurement route should also be set out with an explanation as to why it is appropriate for a bid of the scale and nature submitted.

Please note - all procurements must be made in accordance with all relevant legal requirements. Applicants must describe their approach to ensuring full compliance in order to discharge their legal duties. (Limit 500 words)

A delivery plan and project specific commercial structure has been formulated to reflect the delivery requirements of the LUF.

The Council will retain the role of accountable body and will contract with the partner organisations upon the announcement of the LUF.

This approach will ensure programme risks are managed by the Council while specific project risks sit with the partner organisation who are in the best position to manage and mitigate these risks. Alternative approaches would see the Council taking the lead for the delivery of the projects, however it is concluded that the projects should sit with the relative expertise.

Procurement for the Council works will be managed in accordance with the Council's rules and for each partner as appropriate to their constitution.

### 6.3 Management

See technical note Section 4 and Table 1 for further guidance

Delivery Plan: Places are asked to submit a delivery plan which demonstrates:

- Clear milestones, key dependencies and interfaces, resource requirements, task durations and contingency.
- An understanding of the roles and responsibilities, skills, capability, or capacity needed.
- Arrangements for managing any delivery partners and the plan for benefits realisation.
- Engagement of developers/ occupiers (where needed)
- The strategy for managing stakeholders and considering their interests and influences.
- Confirmation of any powers or consents needed, and statutory approvals eg Planning permission and details of information of ownership or agreements of land/ assets needed to deliver the bid with evidence
- Please also list any powers / consents etc needed/ obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them.

6.3a Please summarise the delivery plan, with reference to the above (Limit 500 words)

A comprehensive delivery programme and accompanying spend profile is provided in Appendix 3 and 6. This programme is formed around the commercial structure for project delivery as described in 6.2.

The interventions proposed will be seen as a programme and the Council will take the lead as Programme and Risk Manager with a specific LUF Board established to monitor progress and ultimately benefits realisation. Each partner will however be responsible for their own project management structures and risk evaluation.

The Wentworth project will be managed by a specialist design team procured via a competitive tendering process in 2020, selected on the basis of price and quality, including experience of delivering similar projects.

Maltby Learning Trust have a clear programme for implementation of the project with phase one works commencing in August 2021 ahead of the bid outcome and the whole project could be completed in February 2023. The team that would

deliver the project successfully managed the Maltby Academy project on the same site and are therefore are familiar with the buildings and importantly have a long standing working relationship with the Town Council and the local community. The buildings and outdoor spaces are all within the ownership of the Trust which would take on the responsibility for operating and managing the complex. A full application for the planning permission has been made and is supported by RMBC and Maltby Town Council. Retention of the building is seen as important to the local community as it is a vital part of local heritage.

The interventions proposed for the Country Parks will be managed by the Council's Regeneration, Development and Investment Office, in line with the Council's project management framework. This team has a wealth of experience of delivering projects of this nature. Support will be provided by the Landscape Design Teams and Culture and Leisure colleagues with the support of external consultants to design and deliver the Country Parks.

Magna adheres to RIBA's plan of work for exhibition design and build projects, and the strategic rationale and outline concepts have already been defined. The competitive tendering process to select an overall contractor will ensure best value is secured for the overall project and lead to successful project execution and completion.

To ensure spend within 2021/22 period the Council and project partners will pursue a number of tasks ahead of the LUF announcement. Designs for the major attractions and Maltby Academy will be developed at risk through to pre-app prior to the LUF announcement and contractor procurement for Wentworth will be progressed to the first stage of a two-stage process..

There are currently no planning permissions in place although consultation has taken place with the Local Planning Authority. Achievement of Planning will be one of the first tasks post submission and prior to the grant being announced.

6.3b Has a delivery plan been appended to your bid?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
6.3c Can you demonstrate ability to begin delivery on the ground in 2021-22?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<p>6.3e Risk Management: Places are asked to set out a detailed risk assessment which sets out (word limit 500 words not including the risk register):</p> <ul style="list-style-type: none"> <li>• the barriers and level of risk to the delivery of your bid</li> <li>• appropriate and effective arrangements for managing and mitigating these risk</li> <li>• a clear understanding on roles / responsibilities for risk</li> </ul>	

As part of the ongoing LUF project validations the consultant team in partnership with development end users and RMBC specialist services representatives (Planning, Finance, Assets, Delivery & Community Coordinators) carried out open contribution Risk Profile Review Meetings. The purpose of these meetings was to identify key risks associated with the specific bid and then each project within the bid.

The Risk Register (appendix 4) is the record of that meeting, noting any risks identified by the contributors, notably:-

- Risk detail
- Identification of what element of the project the risk has potential to effect
- Pre-Contract control
- Mitigation required to control risk during project development phase

By identifying the full spectrum of project risk associated with design, cost, funding, environmental, community expectations, communications strategies and procurement we have been able to identify key management objectives to manage the risks in accordance with the time scales required.

To consider just a few of the key points:

Procurement – almost all attendees have a heightened awareness of current procurement challenges. From the supply of simple materials to securing specialist professional services. In every situation we can mitigate the risk with considered project planning, early engagement with design development and a proactive collaboration between RMBC delivery resource and external consultants.

Programme – assuming an Autumn grant decision date and the need to meet the spending criteria for March 2022 there is significant pressure on creating effective project starts given that typically, RIBA stages 2 to stage 4 can take up to five months in preparation for contractor tender periods. Early engagement with consultant team elevates the feasibility and concept design to “Tender ready” packs which can be coordinated with local authority planning, community liaison, engagement with third party investors.

The LUF Application Risk Registers are a key tool for the successful advancement of the projects detailed within them. Respectful of individual project needs, stake holders and professional team members take ownership of the document to advance it specifically for each project. Reviewing and updating frequently to monitor the changes to the risk profile and plan for the appropriate mitigations. Information contained within this document will shape the approach to community communications, design scope, method of procurement, financial management strategy, engagement with third parties, internal resource and probably most importantly, will provide the action plan for all professional service to take responsibility for specific risk on an agreed time line.

6.3f Has a risk register been appended to your bid?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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6.3g Please evidence your track record and past experience of delivering schemes of a similar scale and type (Limit 250 words)

Wentworth Woodhouse Preservation Trust have successfully raised funding and begun the detailed design works for the Stables project. Since taking ownership of the property in 2017 the Trust has secured and delivered over £10m of funded repairs, all on time and on budget, including a £7.6m award announced by the Chancellor of the Exchequer in the 2016 Autumn Statement.

The Maltby Academy Trust's team took the lead role in the successful development of the 1,200 place Maltby Academy, a £11.5m project delivered in seven phases on a live site between 2012 and 2015. The Trust are currently responsible for three secondary and 4 primary academies.

Importantly the Trust have a longstanding record in working with local businesses and apprenticeship providers an assist that would be further developed and strengthens as part of this project.

Gulliver's Theme Parks have been operating for over 40 years, started by Weavers Close Ltd, who are a building and property development company. Weavers Close has built and developed all of the Gulliver's Theme Parks in Derbyshire, Cheshire, Buckinghamshire and now Yorkshire.

RMBC is managing an extensive capital programme across a complex network of highways, housing, transportation, leisure and education schemes. These programmes are delivered through mixed funding models blending public and private sector funding. Within Culture Sport and Tourism which leads on the development and management of the Country Parks the service is currently managing an annual capital programme of £4.8m across green spaces, heritage sites, and refurbishment of major cultural venues such as the Civic Theatre and community libraries.

In 2018 the service led on the design, development and delivery of the £4.7m Waleswood Caravan and Camping Site creating 131 caravan pitches, 35 camping pitches shower blocks, retail and hospitality facilities across five hectares of sculpted landscaping. Opening in April 2019, the site has since received an AA5\* pennant, been shortlisted for three White Rose awards and been recognised as one of the top 100 sites in the country. It consistently receives excellent feedback from guests on facilities, location and customer care.

6.3h Assurance: We will require Chief Financial Officer confirmation that adequate assurance systems are in place.

For larger transport projects (between £20m - £50m) please provide evidence of an integrated assurance and approval plan. This should include details around planned health checks or gateway reviews. (Limit 250 words)

As Strategic Director of Finance and Customer Services I have responsibility for the administration of the financial affairs of the Council. I can confirm there is a framework of financial control operational in Rotherham Metropolitan Council. Rotherham Metropolitan Council maintains accounting records which disclose with reasonable accuracy, at any time, the financial position of the Local Authority. I am also responsible for an appropriate framework of budgetary monitoring and reporting that ensures budget management is exercised within annual cash limits as delegated to authorised officers of the Council.

#### 6.4 Monitoring and Evaluation

*See technical note Section 4 and Table 1 for further guidance.*

6.4a Monitoring and Evaluation Plan: Please set out proportionate plans for M&E which should include (1000 word limit):

- Bid level M&E objectives and research questions
- Outline of bid level M&E approach
- Overview of key metrics for M&E (covering inputs, outputs, outcomes and impacts), informed by bid objectives and Theory of Change. Please complete Tabs E and F on the **appended excel spreadsheet**
- Resourcing and governance arrangements for bid level M&E

The Accountable Body for expenditure of LUF resources for the Leisure Economy is to be Rotherham MBC, with back to back contracts supplied to the partner organisations. The Council's regeneration project management team has the capacity and skills that are required to monitor the LUF programme against expected milestones, outputs, and outcomes. This will be undertaken during the delivery phase of the programme and will be reported to the LUF Senior Responsible Officer and Assistant Director Planning, Regeneration & Transport.

The Strategic Director for Regeneration and Environment will be the Budget Holder for the projects that make up the LUF intervention programme with overall management responsibility for budget monitoring and administration.

Project Managers (PMs) will have day to day responsibility for ensuring financial control of project budgets and ensuring fully compliant systems are in place, utilising the financial information from the Council's General Ledger and Procurement System, which brings together all income and expenditure, orders raised, and invoices paid.

PMs would check expenditure has been defrayed and collate all supporting documentation. Projects included in the Council's approved Capital Programme are monitored using the Council's electronic monitoring system. Quarterly budget

positions on the Capital Programme are reported at Full Cabinet, where they can be scrutinised by Councillors and the public.

The systems put in place to monitor programme delivery are based on effective methods used previously for managing and monitoring EU funded projects and programmes and are based on robust methods applied and approved by External Audit.

### **Approach to Monitoring & Evaluation**

An outline monitoring structure has been developed by Rotherham MBC. Following confirmation of the award of LUF support, this monitoring framework will be further developed and agreed between the Council (as the Accountable Body), key stakeholders and project partners. The finalised strategy would monitor progress of the scheme both during its delivery period and after completion.

A vital part of the process is to assess the performance of the programme of LUF investment. Following confirmation of the success of the bid, an early action would be for the Council to appoint (through competitive tendering) appropriately experienced experts to design and implement a programme evaluation framework.

It is expected that this process would require a multi-disciplinary team including regeneration consultants, property advisers, and market researchers. In particular, consultancy expertise would be required to evaluate the success of the intervention in effecting lasting change to the local leisure and tourism economy of Rotherham.

It is proposed that an interim evaluation be undertaken at around the mid-point of the LUF investment programme. The focus of this evaluation would be to monitor progress on expenditure and emerging evidence of impact. There would be an emphasis on identifying any issues with delivery and performance to enable appropriate adjustment to programme and project management and delivery mechanisms (if these are necessary to advisable) to ensure maximum success of the second half of the delivery programme.

A final evaluation would be undertaken at the end of the programme to enable estimates of overall impacts, recommendations for the consolidation, and to identify good practice and potential lessons for future regeneration strategy.

### **KPIs and Data Monitoring**

Performance against financial targets (expenditure, co-investment) would be monitored by the Council through the governance and project oversight structures described above.

Project output targets have been established at the bid design stage for each project included in the bid. Assuming a successful bid, the project output targets would be subsumed into a project output monitoring framework and progress towards targets would form a key part of the supervision and oversight process.



Proposed KPIs include the following project level outputs (subject to fine-tuning when LUF resources are confirmed):

- Number and/or sqm of new or improved leisure venues or facilities
- Sqm of new or improved public realm
- Numbers of visitors visiting facilities/attractions
- Number of trainees or learners participating in training courses
- Qualifications achieved by trainees
- Energy use by facilities receiving investment in new systems

The monitoring of the impact of LUF expenditure would focus on a hierarchy of phased targeted outcomes, including the following:

- **Short term** (1-2 years): Progress towards delivery of outputs; changes in the number of visitors; estimated value of construction investment.
- **Medium term** (3-4 years): Continued progress and completion of project outputs; visitor expenditure data; crime levels within a one-mile radius of the Attractions; the number of Rotherham residents with jobs in the visitor and leisure economy..
- **Longer term** (5+ years): As well as continued monitoring of medium-term data, the focus of monitoring over the longer term would include assessment of additional investment by leisure sector operators; commercial property data (rents & yields) for leisure sector businesses; estimates of Gross Value Added generated by the leisure economy in Rotherham.

Monitoring data will be obtained from a variety of sources, including monitoring of visitor numbers at key attractions, and estimates of the overall volume and value of the tourism and leisure economy for Rotherham.

## PART 7 DECLARATIONS

### 7.1 Senior Responsible Owner Declaration


As Senior Responsible Owner for Leisure Economy & Skills I hereby submit this request for approval to UKG on behalf of Rotherham Metropolitan Borough Council and confirm that I have the necessary authority to do so.

I confirm that [*name of organisation*] will have all the necessary statutory powers and other relevant consents in place to ensure the planned timescales in the application can be realised.

Name:

Simon Moss

Signed:



### 7.2 Chief Finance Officer Declaration

As Chief Finance Officer for Rotherham Metropolitan Borough Council I declare that the scheme cost estimates quoted in this bid are accurate to the best of my knowledge and that Rotherham Metropolitan Borough Council

- has allocated sufficient budget to deliver this scheme on the basis of its proposed funding contribution
- accepts responsibility for meeting any costs over and above the UKG contribution requested, including potential cost overruns and the underwriting of any funding contributions expected from third parties
- accepts responsibility for meeting any ongoing revenue requirements in relation to the scheme
- accepts that no further increase in UKG funding will be considered beyond the maximum contribution requested and that no UKG funding will be provided after 2024-25
- confirm that the authority commits to ensure successful bids will deliver value for money or best value.
- confirms that the authority has the necessary governance / assurance arrangements in place and that all legal and other statutory obligations and consents will be adhered to.

Name:

Judith Badger

Signed:



### 7.3 Data Protection

Please note that the The Ministry of Housing, Communities and Local Government (MHCLG) is a data controller for all Levelling Up Fund related personal data

collected with the relevant forms submitted to MHCLG, and the control and processing of Personal Data.

The Department, and its contractors where relevant, may process the Personal Data that it collects from you, and use the information provided as part of the application to the Department for funding from the Levelling Up Fund, as well as in accordance with its privacy policies. For the purposes of assessing your bid the Department may need to share your Personal Data with other Government departments and departments in the Devolved Administrations and by submitting this form you are agreeing to your Personal Data being used in this way.

Any information you provide will be kept securely and destroyed within 7 years of the application process completing.

**You can find more information about how the Department deals with your data [here](#).**

**Annex A - Project One Summary** (only required for a package bid)

Project 1	
A1. Project Name: Leisure Economy: Major Attractions	
A2. Strategic Linkage to bid: Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
<p>This project seeks to update, upgrade and rejuvenate 4 of the Borough's major attractions in recognition of the significant contribution the Leisure, Culture and Tourism industry can make to our economy.</p> <p>The attractions have been chosen due to the scale and significance of their offer and the variety of their market appeal.</p>	
A3. Geographical area: Please provide a short description of the area covered by the bid ( <u>in no more than 100 words</u> )	
The projects are located across the Borough and thus provide a widespread offer to the entire community. Their proximity to areas of deprivation in terms of skills, training, health and unemployment can be seen in Appendix 5.	
A4. OS Grid Reference	Wentworth Woodhouse SK39596 97665 Rother Valley Country Park SK45782 82644 Thrybergh Country Park SK47633 95741 Magna SK40922 91658
A5. Postcode	Wentworth Woodhouse S62 7TQ Rother Valley Country Park S26 5PQ Thrybergh Country Park S65 4PA Magna S60 1FE
A6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	
A7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	<input checked="" type="checkbox"/> Yes  <input type="checkbox"/> No
A8. Project theme Please select the project theme	<input type="checkbox"/> <b>Transport investment</b> <input type="checkbox"/> <b>Regeneration and town centre investment</b>

	<input checked="" type="checkbox"/> <b>Cultural investment</b>																		
A9. Value of capital grant being requested for this project (£):	£14,490,000																		
A10. Value of match funding and sources (£):	£710,000																		
<p>A11. Value for Money</p> <p>This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment (Limit 250 word</p> <p>The impacts expected to be delivered by the Leisure Attractions are of the same type described in Section 5 above, such as site-specific Land Value Uplift, Wider Area LVU, Jobs made more Accessible, Amenity value, etc. The mechanisms through which these benefits would be delivered are also explained in Section 5.</p> <p>The table below provides a quantified summary of the Benefits expected to be delivered by LUF investment and associated co-funding for the Leisure Attractions specifically.</p> <p><b>Summary of LUF benefits: Leisure Attractions</b></p> <table border="1"> <thead> <tr> <th><b>Benefits for BCR</b></th> <th><b>Present Value, 2021/22 prices (£millions)</b></th> </tr> </thead> <tbody> <tr> <td>Land value uplift (site specific)</td> <td>3.102</td> </tr> <tr> <td>Wider area LVU – residential</td> <td>8.399</td> </tr> <tr> <td>Wider area LVU – commercial</td> <td>0.000</td> </tr> <tr> <td>Amenity value benefits</td> <td>36.163</td> </tr> <tr> <td>Crime reduction benefits</td> <td>0.270</td> </tr> <tr> <td>Benefits of jobs made more accessible to the currently unemployed</td> <td>1.093</td> </tr> <tr> <td>Additional public revenues</td> <td>3.328</td> </tr> <tr> <td>Carbon savings</td> <td>2.713</td> </tr> </tbody> </table>		<b>Benefits for BCR</b>	<b>Present Value, 2021/22 prices (£millions)</b>	Land value uplift (site specific)	3.102	Wider area LVU – residential	8.399	Wider area LVU – commercial	0.000	Amenity value benefits	36.163	Crime reduction benefits	0.270	Benefits of jobs made more accessible to the currently unemployed	1.093	Additional public revenues	3.328	Carbon savings	2.713
<b>Benefits for BCR</b>	<b>Present Value, 2021/22 prices (£millions)</b>																		
Land value uplift (site specific)	3.102																		
Wider area LVU – residential	8.399																		
Wider area LVU – commercial	0.000																		
Amenity value benefits	36.163																		
Crime reduction benefits	0.270																		
Benefits of jobs made more accessible to the currently unemployed	1.093																		
Additional public revenues	3.328																		
Carbon savings	2.713																		

<b>Total benefits for BCR</b>	<b>55.068</b>
<p>The total value of expected benefits to be delivered by the Attractions amount to a Present Value of £55.068 million.</p>	
<p>A12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.</p>	
<p>A13. Where available, please provide the BCR for this project</p>	<p>The formula used to calculate the BCR is:</p> <ul style="list-style-type: none"> <li>• (Present Value of expected Benefits minus Present Value of expected Private Sector Investment) divided by the Present Value of expected Public Sector Costs.</li> </ul> <p>Inserting the present values for benefits and the various costs noted above yields the following BCR result for the Leisure Attractions: <b>3.38</b>.</p>
<p>A14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.</p>	<p>Additional quantifiable benefits for the Leisure Attractions not included in the BCR include:</p> <ul style="list-style-type: none"> <li>• Job creation potential: an estimated 113 gross jobs would be created through the development of new facilities and commercial floorspace.</li> <li>• Additional direct GVA associated with new business activity worth around £3.4 million per annum</li> <li>• Construction phase employment amounting to around 45 jobs.</li> </ul>
<p><b>A15. Deliverability</b>  Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.</p>	
<p>Both the Magna and Wentworth projects will be managed by the Council's partners. Each have committed to delivery and plans are already well developed with the concepts having been in existence for a number of years.</p>	

<p>The Council will deliver the Country Parks projects.</p> <p>For all work will continue at risk ahead of the LUF announcement to ensure projects are ready to defray funds in 21/22.</p>	
<p><b>A16. The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22</b></p> <p>As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22</p>	
<p>A17. Does this project includes plans for some LUF expenditure in 2021-22?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>A18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>A19. Please provide evidence</p>	<p>These projects could be delivered independently but would not be so impactful.</p>
<p>A20. Can you demonstrate ability to deliver on the ground in 2021-22.</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>A21. Please provide evidence</p>	<p>See Delivery Plan in Appendix 5</p>
<p><b>Statutory Powers and Consents</b></p>	
<p>A22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.</p>	
<p>A23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.</p>	<p>All projects will require planning permission and will pursue this prior to any LUF decision</p>

**Annex B - Project Two description and funding profile** (only required for package bid)

Project 2	
B1. Project Name	Leisure Economy: Skills
B2. Strategic Linkage to bid:  Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
This project supports the development of a strong skills base to support the emerging leisure economy. Based in two new centres providing vocational training specifically designed to support the leisure industry.	
B3. Geographical area: Please provide a short description of the area covered by the bid ( <u>in no more than 100 words</u> )	
The Gullivers Skills Village is located in the wider Gullivers resort neighbouring the Rother Valley Country Park. Maltby Academy occupies a prime position on the Maltby High Street, offering not only the opportunity to provide a new skills and community hub but providing a landmark development for the town. Appendix 5 demonstrates the projects relation to areas of deprivation in skills, health and employment.	
B4. OS Grid Reference	Maltby Academy SK52837 92040 Gullivers SK45782 82644
B5. Postcode	Maltby Academy S66 8LJ Gullivers S26 5PQ
B6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	
B7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	
B8. Project theme Please select the project theme	<input type="checkbox"/> <b>Transport investment</b> <input type="checkbox"/> <b>Regeneration and town centre investment</b> <input checked="" type="checkbox"/> <b>Cultural investment</b>
B9. Value of capital grant being requested for this project (£):	£5,500,000
B10. Value of match funding and sources (£):	£2,454,228
B11. Value for Money	



This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment

The impacts expected to be delivered by the Skills development facilities are of the same type described in Section 5 above, such as site-specific Land Value Uplift, Wider Area LVU, Jobs made more Accessible, Amenity value, etc. One exception is that there are no carbon reduction benefits associated with the Skills elements.

The mechanisms through which the various benefits would be delivered are explained in Section 5.

The table below provides a quantified summary of the Benefits expected to be delivered by LUF investment and associated co-funding for the Leisure Skills facilities specifically.

#### **Summary of LUF benefits: Leisure Skills**

<b>Benefits for BCR</b>	<b>Present Value, 2021/22 prices (£millions)</b>
Land value uplift (site specific)	6.552
Wider area LVU – residential	11.517
Wider area LVU – commercial	4.280
Amenity value benefits	0.517
Crime reduction benefits	0.512
Benefits of jobs made more accessible to the currently unemployed	0.834
Additional public revenues	2.537
Carbon savings	0.000
<b>Total benefits for BCR</b>	<b>26.749</b>

The total value of expected benefits to be delivered by the Skills elements amount to a Present Value of £26.749 million

B12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.

The total value of expected benefits to be delivered by the Skills elements amount to a Present Value of £26.749 million.

The present value of the LUF resources being bid for with respect to the Skills elements amounts to £5.263 million. In addition, an allowance for optimism bias to a value of £0.789 million is also made.

Public sector co-funding amounts to £1.115 million. An allowance for optimism bias to a value of £0.167 million is also made.

Private sector co-funding with a present value of £1.230 million is also included in the BCR calculation.

B13. Where available, please provide the BCR for this project

The formula used to calculate the BCR is:

- (Present Value of expected Benefits minus Present Value of expected Private Sector Investment) divided by the Present Value of expected Public Sector Costs.

Inserting the present values for benefits and the various costs noted above yields the following BCR result for the Leisure Skills elements: **3.48**.

B14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.

Additional quantifiable benefits for the Skills activities not included in the BCR include:

- Job creation potential: an estimated 28 gross jobs would be created through the development of new facilities and commercial floorspace.
- Additional direct GVA associated with new business activity worth around £840,000 per annum
- Construction phase employment amounting to around 20 jobs.

**B15. Deliverability**

<p>Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.</p>	
<p>Both projects will be delivered by partner organisations. Each have well progressed designs having been in existence as a concept for a number of years. Each partner will continue to work at risk to develop the project ready for delivery and defrayal of funds in the first financial year of the LUF.</p>	
<p><b>B16. The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22</b></p>	
<p>As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22</p>	
<p>B17. Does this project includes plans for some LUF expenditure in 2021-22?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B19. Please provide evidence</p>	<p>These projects could be delivered independently but would not be so impactful.</p>
<p>B20. Can you demonstrate ability to deliver on the ground in 2021-22.</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B21. Please provide evidence</p>	<p>See Delivery Plan in Appendix 6</p>
<p><b>Statutory Powers and Consents</b></p>	
<p>B22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.</p>	<p>Gullivers has planning permission secured</p>
<p>B23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.</p>	<p>The Maltby Academy will require planning permission, this is being pursued ahead of the LUF announcement</p>



**Annex C – Project Three- description and funding profile** (only required for package bid)

Project 3	
C1. Project Name	
C2. Strategic Linkage to bid:  Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
C3. Geographical area: Please provide a short description of the area covered by the bid ( <u>in no more than 100 words</u> )	
C4. OS Grid Reference	
C5. Postcode	
C6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	
C7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	
C8. Project theme Please select the project theme	<input type="checkbox"/> <b>Transport investment</b> <input type="checkbox"/> <b>Regeneration and town centre investment</b> <input type="checkbox"/> <b>Cultural investment</b>
C9. Value of capital grant being requested for this project (£):	
C10. Value of match funding and sources (£):	
C11. Value for Money	

<p>This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment</p>	
<p>C12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.</p>	
<p>C13. Where available, please provide the BCR for this project</p>	
<p>C14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.</p>	
<p><b>C15. Deliverability</b>  Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.</p>	
<p><b>C16. The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22</b></p> <p>As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22</p>	
<p>C17. Does this project includes plans for some LUF expenditure in 2021-22?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>C18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>

C19. Please provide evidence	
C20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input type="checkbox"/> Yes <input type="checkbox"/> No
C21. Please provide evidence	
<b>Statutory Powers and Consents</b>	
C22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.	
C23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.	

## ANNEX D - Check List Great Britain Local Authorities

Questions	Y/N	Comments
<b>4.1a Member of Parliament support</b>		
MPs have the option of providing formal written support for one bid which they see as a priority. Have you appended a letter from the MP to support this case?	Y	Appendix 1
<b>Part 4.2 Stakeholder Engagement and Support</b>		
Where the bidding local authority does not have responsibility for the delivery of projects, have you appended a letter from the responsible authority or body confirming their support?	Y	Appendix 2
<b>Part 4.3 The Case for Investment</b>		
For Transport Bids: Have you provided an Option Assessment Report (OAR)	N/A	
<b>Part 6.1 Financial</b>		
Have you appended copies of confirmed match funding?	Y	Appendix 2
The UKG may accept the provision of land from third parties as part of the local contribution towards scheme costs. Please provide evidence in the form of a letter from an independent valuer to verify the true market value of the land.  Have you appended a letter to support this case?	N/A	
<b>Part 6.3 Management</b>		
Has a delivery plan been appended to your bid?	Y	Appendix 3
Has a letter relating to land acquisition been appended?	N/A	
Have you attached a copy of your Risk Register?	Y	Appendix 4
<b>Annex A-C - Project description Summary (only required for package bid)</b>		
Have you appended a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	Y	Appendix 5



## Annex E Checklist for Northern Ireland Bidding Entities

Questions	Y/N	Comments
<b>Part 1 Gateway Criteria</b>		
You have attached two years of audited accounts		
You have provided evidence of the delivery team having experience of delivering two capital projects of similar size and in the last five years		
<b>Part 4.2 Stakeholder Engagement and Support</b>		
For transport bids, have you appended a letter of support from the relevant district council		
<b>Part 6.1 Financial</b>		
Have you appended copies of confirmed match funding		
The UKG may accept the provision of land from third parties as part of the local contribution towards scheme costs. Please provide evidence in the form of a letter from an independent valuer to verify the true market value of the land.		
<b>Part 6.3 Management</b>		
Has a delivery plan been appended to your bid?		
Has a letter relating to land acquisition been appended?		
Have you attached a copy of your Risk Register?		
<b>Annex A-C - Project description Summary (only required for package bid)</b>		
Have you appended a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.		