

Apply to the levelling up fund round 2

Submission details

Submission reference	LUF20131
Created time	Wed, 10 Aug 2022 08:42
Signed-in user	73aaca53-4197-4bfe-90ef-c6213d177558

What is the legal name of the lead applicant organisation?

Knowsley Metropolitan Borough Council

Where is your bid being delivered?

England

Select your local authority

Knowsley

Enter the name of your bid

Halewood Leisure and Connectivity Improvements

Does your bid contain any projects previously submitted in round 1?

No

Bid manager contact details

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Local Authority Leader contact details

Full name	Councillor Graham Morgan
Position	Leader of Knowsley Council
Telephone number	0151 443 3407
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Enter the name of any consultancy companies involved in the preparation of the bid

Wisher Consulting
WSP

Enter the total grant requested from the Levelling Up Fund

£15356140

Investment themes

Regeneration and town centre	30%
Cultural	35%
Transport	35%

Which bid allowance are you using?

How many component projects are there in your bid?

1

Do you have the support of all the authorities with the relevant statutory responsibility before proceeding?

Yes

File upload 1

Upload pro forma 1	LUF Round 2 Pro formas V6.1 Proforma 1 signed.docx
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Are you submitting a joint bid?

No

Grant value declaration

I am submitting a bid as a single applicant and can confirm that the bid overall does not exceed £20 million grant value	Tick to confirm
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Gateway criteria: costings, planning and defrayment

I confirm that some LUF grant funding will be defrayed in the 2022/23 financial year	Tick to confirm
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Costings and Planning Workbook	LUF_Single_Project_Costings_and_Planning_Wkbook_v2.00 - NEW VERSION.xlsx
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Provide bid name

Halewood – District Centre Connectivity & Leisure Improvements

Provide a short description of your bid

Halewood is a growth location with potential to deliver up to 1,500 additional homes and an expanding District Centre.

The District Centre is currently disjointed, unattractive and does not connect well with existing and proposed residential areas. Levelling Up Fund will be used to develop sustainable transport enhancements to the existing and

extended district centre.

There is also an identified need for improved leisure and recreational facilities to better serve the Halewood population. The LUF will be used to put in place improved sports, open space and leisure facilities.

These LUF interventions will be wrapped around private sector investment to expand the existing District Centre. This element of the wider project is not seeking LUF funding.

Provide a more detailed overview of your bid proposal

Halewood is an important town within Knowsley and has significant proposals for growth with its population set to grow by 20% following the delivery of the East of Halewood development site - which will include approximately 1,500 homes over the next 10 years.

This LUF bid for Halewood builds on feedback provided from residents during the East of Halewood Masterplan consultation and seeks to ensure that both existing and new residential areas have access to appropriate recreational and leisure facilities and more sustainable transport connections.

The proposed project comprises a number of interlinked interventions as follows:

- Package of improved cycle and walking interventions to provide strong, green east to west connectivity between the new housing development and Wood Road Green Space, via Finch Woods, the Leisure Centre and the district centre, and beyond to local employment and leisure facilities.

- New and improved playing pitches and open space facilities at Wood Road Green Space.

- New and improved all weather playing pitches and upgrades to the sports and leisure facilities including improvements to and decarbonisation of the existing Leisure Centre at the Halewood Leisure Centre site.

- Deliver an improved District Centre which better serves the whole community helping to sustain and create local jobs. This will involve an expanded retail and commercial offer directly opposite the District Centre. This aspect will be funded by the private sector and is not subject to Levelling Up Funding.

This bid will deliver significant improvements to and expansion of the local district centre, greenspace and leisure facilities, and walking and cycling connectivity throughout the town and areas of employment.

The improvements will address significant health inequalities, tackle the Climate Emergency and address issues relating to connectivity and access to employment - all of which are critical if we are to truly 'level up' Halewood.

The proposals include an expansion of the retail and commercial offer. The existing sports facilities will be relocated and significantly enhanced on land within the existing green space including the provision of all-weather pitches. The proposals will also seek to deliver enhancements on the existing Wood Road green space, helping to better connect this important green space to the district centre.

This investment should help to deliver significant enhancements and improvements to the existing leisure centre including delivering a series of improvements and decarbonisation to make the facilities modern and fit for purpose, helping to tackle the Climate Emergency.

The proposals will include significant improvements to the public spaces and a greening up with tree planting. Further green connections from East of Halewood site, through to the Leisure Centre site to the district centre and Wood Road green space are proposed and there will be a package of cycle and walking enhancements for the wider area.

This funding provides a genuine opportunity to help 'level up' one of the most deprived areas in the country.

Provide a short description of the area where the investment will take place

All of the proposed Levelling Up Funding will be deployed within Halewood.

The borough of Knowsley is strategically located at the heart of the North West of England and is part of the wider Liverpool City Region – sitting between Liverpool to the west and St Helens to the east. Knowsley is a Priority 1 location for the Levelling Up Fund, and rightly so. The borough is ranked as the second most deprived in England out of 317 Local Authorities (i.e. in the top 1%).

Through Knowsley's Local Plan land was released for a Sustainable Urban Expansion at Halewood. In 2019, a Masterplan was produced to guide the delivery of this site.

Halewood is the smallest of Knowsley's townships with a population of just over 20,000. Halewood is located towards the south of Knowsley and has strong connections with the city of Liverpool and in some ways is a continuation of the city's suburbs.

The proposed location of our proposals for investment can be seen on the attached plan (Appendix 1 and Appendix 2).

The town centre is currently disconnected from the rest of Halewood and is in need of expansion and as such there is a significant opportunity for the centre to better serve local residents. This proposal seeks to address these challenges.

The interventions focus on improving local facilities and connecting the new housing area's to the existing district centre with a series of new cycleways and upgraded footways.

Through the provision of new local cycle paths linking to Merseyside's strategic cycle network residents of Halewood will have improved access to key employment areas.

Additional improvements will be made to the Halewood Leisure Centre and the Wood Road green space to provide a improved sporting facilities at the leisure centre, as well as a range of improved playing pitches.

Optional Map Upload

Appendix 2 Location Maps and Data Tables.pdf

Does your bid include any transport projects?

No

Provide location information

Location 1

Enter location postcode L26 0TX

Enter location grid reference SJ448852

Percentage of bid invested at the location 100%

Select the constituencies covered in the bid**Constituency 1**

Constituency name	Garston and Halewood
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Estimate the percentage of the bid invested in this constituency	100%
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Select the local authorities covered in the bid**Local Authority 1**

Local authority name	Knowsley
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Estimate the percentage of the bid invested in this local authority	100%
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Sub-categories that are relevant to your investment

Select one or more regeneration sub-categories that are relevant to your investment	Commercial
--	------------

Select one or more cultural sub-categories that are relevant to your investment	Sports and athletics facilities
--	---------------------------------

Select one or more transport sub-categories that are relevant to your investment	Active Travel
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Provide details of any applications made to other funding schemes for this same bid that are currently pending an outcome

Knowsley Borough Council have submitted a bid to the Liverpool City Region Combined Authority to the value of £2m to fund the delivery of a cycleway along the A562 Higher Road. Any works would be funded by the City Region Sustainable Transport Settlement, it is anticipated that a decision on whether KMBC are successful will be made towards the end of August 2022.

We have requested funding to part deliver the cycleway as part of our LUF submission. We will still require LUF funding in the event of a successful funding bid with the Liverpool City Region Combined Authority.

There are no other pending applications relevant to this submission.

Provide VAT number if applicable to your organisation

165597522

Bidders are invited to outline how their bid will promote good community relations, help reduce disparities amongst different groups, or strengthen integration across the local community

The delivery of our Halewood Leisure & Connectivity Improvements proposals has been designed to be as inclusive as possible and to support good community relations.

Our Levelling Up project, has been developed based on an extensive public consultation involving the local community and stakeholders over a number of years. As our proposals have been directly informed by the feedback from these consultations (for example on the Land East of Halewood SPD proposals), there is strong community support. It is the Council's intention is to undertake further stakeholder engagement as we fully develop up final designs. As such, we have a good platform for promoting good community relations.

The draft East of Halewood Masterplan and East of Halewood Supplementary Planning Document was subject to a period of public consultation from 28 February until 10 April 2019.

The consultation focused on an overall plan that will guide the future development of the site and the wider District Centre. This includes the creation of new homes, improvements to public open space and the potential for some limited commercial uses on part of the site.

As part of the consultation a short film highlighting the key aspects of the draft masterplan and the main masterplan framework diagram was produced showing 'at a glance' the broad areas for development, public open space and key access points to the site.

Materials were also made available for public viewings in the Halewood Leisure Centre and the Halewood Centre.

A number of drop in events also took place in which Council officers would meet and discuss the proposals with residents.

This consultation included:

- Establishment of a consultation website and online comments form;
- Letters to neighbouring properties
- Letters / emails to Local Plan database and statutory consultees;
- Site notices, posters and adverts;
- Information point in neighbouring leisure centre and hard copy documents in local libraries and One Stop Shops;
- Social media, community messaging and business newsletter; and
- Drop in public consultation events, attended by approximately 100 individuals.

The responses received raised a wide variety of matters; the focus of comments from members of the public and local businesses was on concerns about local impacts of the development of the site, for example on traffic, community facilities, residential amenity and existing commercial operations.

Discussions have also taken place with members of local sports clubs to

understand their needs and to seek support for the proposals. With improved facilities the Council want to work with these groups to encourage greater engagement with the local community.

Our proposals focus on improving connectivity for all in Halewood to better connect residents to the district centre and employment areas, along with improvements to leisure facilities and open space creating a greater draw for residents to use the centre.

The centre of Halewood will become an area where people come together for retail, leisure, socialising and to receive support and assistance.

Our proposals have been developed to support the work of community organisations including Grace Church which is a not-for-profit organisation who run a number of outreach programmes to work with and support the people of Halewood.

More locally, the wards immediately surrounding Halewood are some of the most deprived within England and therefore experience poorer health and social outcomes than most other areas in the country. Many people in Halewood experience multiple inequalities in their daily lives because of low-income levels and the failing local infrastructure. For these groups and others our proposals offer an opportunity to promote better physical and mental health and wellbeing which in turn will help to lift people out of poverty.

Through the provision of an improved leisure centre and sports pitches our proposals will help bring people together through sport, whilst also supporting individual health.

The proposed interventions have been developed with a holistic approach to directly reduce inequalities and support a healthy and active community at a strategic level. The proposals will also support employment opportunities helping people to re-enter the labour market and maximise the health and socio-economic benefits that being in work brings.

Public realm improvements will support the movement of those with physical disabilities or mobility issues. Prioritisation of pedestrians and cyclists and improved landscaping will help those with physical or sensory disabilities or poor mental health in navigating around Halewood.

The proposals have been designed to include an extended and improved District Centre which will be accessible to all, with a focus on high quality usable outdoor space. It is our belief that by reconnecting the people of Halewood with the district centre we will strengthen the sense of place and community pride.

Is the support provided by a 'public authority' and does the support constitute a financial (or in kind) contribution such as a grant, loan or guarantee?

Yes

Does the support measure confer an economic advantage on one or more economic actors?

No

Provide further information supporting your answer

The proposal involves upgrading existing Council owned assets

Is the support measure specific insofar as it benefits, as a matter of law or fact, certain economic actors over others in relation to the production of certain goods

or services?

No

Provide further information supporting your answer

The proposed support measure involves upgrading existing Council owned assets which are not in competition regarding the production of goods or services with the private sector.

The proposed interventions will not be delivered without this funding.

Does the support measure have the potential to cause a distortion in or harm to competition, trade or investment?

No

Provide further information supporting your answer

We are simply upgrading existing Council owned assets that are not in direct competition with the private sector.

We are proposing upgrades to a Council owned gym and there are private sector gyms nearby. However, private sector gyms cater for a different market with the leisure centre running a number of non for profit community based activities. The proposed works to the leisure centre include a decarbonisation programme, as well as improvements to support community based activities which are not directly in competition with the private sector.

Will you be disbursing the funds as a potential subsidy to third parties?

No

Has an MP given formal priority support for this bid?

Yes

Full name of MP

Maria Eagle

MP's constituency

Garston and Halewood

Upload pro forma 6

Appendix 3 MP Support.pdf

Describe what engagement you have undertaken with local relevant stakeholders. How has this informed your bid and what support do you have from them?

At the time of writing this funding application, consultation has been undertaken which identified a fundamental need for additional facilities in and around Halewood District Centre which this application seeks to address. We have provided below a summary of the consultation undertaken to date which identified this need. It is our intention to undertake additional consultation on these proposals subject to this successful LUF application.

The draft East of Halewood Masterplan and East of Halewood Supplementary Planning Document was subject to a period of public consultation from 28 February until 10 April 2019.

The consultation focused on an overall plan that will guide the future development of the site. This includes the creation of new homes, improvements to public open space and the potential for some limited commercial uses on part of the site.

As part of the consultation a short film highlighting the key aspects of the draft masterplan and the main masterplan framework diagram was produced showing at a glance the broad areas for development, public open space and key access points to the site.

Materials were also made available for public viewings in the Halewood Leisure Centre and the Halewood Centre.

A number of drop in events also took place in which Council officers would meet and discuss the proposals with residents.

This consultation included:

- Establishment of a consultation website and online comments form;
- Letters to neighbouring properties
- Letters / emails to Local Plan database and statutory consultees;
- Site notices, posters and adverts;
- Information point in neighbouring leisure centre and hard copy documents in local libraries and One Stop Shops;
- Social media, community messaging and business newsletter; and
- Drop in public consultation events, attended by approximately 100 individuals.

In total, 104 responses to the consultation were received, either through the website, by email or by letter. The majority of responses were received from members of the public, while responses were also received from selected statutory agencies, landowners and developers with an interest in the site, neighbouring businesses and other respondents.

The responses received raised a wide variety of matters; the focus of comments from members of the public and local businesses was on concerns about local impacts of the development of the site, for example on traffic, community facilities, residential amenity and existing commercial operations. Landowner and developer comments generally focussed on seeking detailed changes to the documents, and expressed concerns about the deliverability of the Council's proposals.

Additional consultation took place with relevant ward members and Cabinet members within Knowsley Council on proposals for the Higher Road cycle scheme and other sustainable transport interventions.

Discussions have also taken place with members of local sports clubs to understand their needs and to seek support for new and improved facilities being proposed within this application.

As our proposals are still at a relatively early stage of development we have not yet engaged with Sports England regarding the relocation, improvement and additional provision of sports pitches.

Council officers have also met with local community groups including Grace Church Halewood who are a not for profit organisation and perform a number of community engagement events to support the needs of residents in Halewood. This group has made us aware that there is an increase in demand for their services and they have requested additional community space and playing pitches to help them to meet this demand.

A number of letters of support from various stakeholders have been provided as part of this application. Please see Appendix 5.

Has your proposal faced any opposition?

At this early stage in the development of our proposals we have not undertaken a full consultation exercise and as such our proposals have not faced any opposition. Our proposals have however been discussed with relevant stakeholders.

We have consulted on the Land East of Halewood Masterplan which did

provide evidence for the need for additional facilities the public want to see delivered in Halewood.

As a key stakeholder that would be directly affected by the proposals, we have consulted with local sporting clubs who have welcomed the proposals as having the potential to address issues they face of poor-quality facilities and a lack of existing provision.

At this early stage of development we have not yet to formally consult with Sports England over our proposals to relocate the existing sports pitches. However, it is our intention to start discussions with them imminently.

Our proposals have been developed to meet the requirements of Sport England in terms of increasing both the quantity and quality of sporting pitch provision within the immediate locality.

If our application is successful a full programme of consultation will take place.

Do you have statutory responsibility for the delivery of all aspects of the bid?

Yes

Provide evidence of the local challenges / barriers to growth and context that the bid is seeking to respond to

Halewood is the smallest of Knowsley's townships with a population of just over 20,000. Its population is likely to increase significantly (20%) due to housing development to the east of Halewood. The District Centre has been subject to some investment but is now at a point where reinvigoration is needed.

There are significant socio-economic issues in the Halewood. This, along with anticipated population growth, means that there is now a need for significant investment. Halewood faces six main challenges:

First, high levels of deprivation

- Four of the 15 LSOAs comprising and surrounding Halewood are in the most deprived decile in England. Five are in the top decile for health deprivation (see Appendix 2, Fig 2).
- Halewood South is a "left behind area" according to the Local Trust.

Second, inadequate walking and cycling infrastructure / car dominance

Local journeys are imbalanced towards car use, and there are challenges to walking and cycling in much of Halewood:

- Nine of the 15 Halewood LSOAs have longer walking journey times than the England average to the eight key services (as defined by the DfT). Eight of the LSOAs have equal to or worse journey times to key services by cycling than the England average.
- The Knowsley Local Plan recognises the need to develop sustainable transport infrastructure, in recognition of the isolation of Halewood from other parts of the borough.

Third, leisure & open space that is in need of investment

There are opportunities to improve access to leisure facilities and green space in Halewood:

- The Knowsley Local Plan identifies that a shortage of good quality greenspace as an issue in Halewood.
- There were 3.5 visits to Halewood Leisure Centre by Knowsley residents per head of the Halewood population (2019/20). This is a lower rate than our borough average (3.7 visits per head).
- In 2018, there was a shortfall in provision of all forms of sport pitches in

Halewood.

- In 2021/22, Halewood Leisure Centre was the third highest gas consuming building in the Council's asset stock and was the second highest consumer of electricity.

Fourth, health inequalities

Public Health data shows that health outcomes in Halewood are worse than in England overall:

- Life expectancy for men is lower in Halewood South (77.6) than in England overall (79.7). For women, life expectancy is also lower.
- The rates of death before 75, incidence of cancer, incidence of lung cancer, and rates of limiting long-term illnesses or disabilities are all higher in Halewood South than in England.
- 36.9% of people in Knowsley say they are inactive, taking less than 30mins of activity per week, compared to 27.2% in England.

Fifth, a District Centre in need of expansion

Although there has been investment in the District Centre historically, this is now in need of reinvigoration:

- Knowsley's Local Plan sets out a spatial vision, including an ambition that Halewood District Centre will be "renewed and thriving".
- Recent consultation with the public (on the East of Halewood SPD) revealed a number of issues, including that the existing retail facilities are too busy and lacking sufficient parking.

Sixth, low levels of Community Pride

The Council's engagement with residents in 2018-19 showed that most Knowsley residents were happy in the area where they live, but also that there were some issues:

- The things people value most about the area where they live include, green/open spaces, proximity to shops, and transport links to the wider region.
 - But they disliked the lack of facilities/amenities, including leisure and the general offer of town centres, as well as transport issues.
-

Explain why Government investment is needed (what is the market failure)

Government investment in LUF is required in order to address market failure and support social, economic and environmental benefits.

Although there would be a receipt from the disposal of the green space, this would not be sufficient to meet the needs of Halewood's growing population.

Improvements to the public realm cannot be funded through private investment or carried out by the private sector. Public realm improvements can be considered a public good, as they do not generate economic benefits for a single user, rather it generates benefits for everyone. This is expected to be a catalyst to further private sector investment in the district centre because the improvements will create a more desirable location for work, leisure and retail.

Similarly, improvement to open space, leisure facilities and active travel provision are not activities which provide an investment opportunity for a single investor. Rather, these are likely to facilitate positive externalities such as improved health and wellbeing among the population, and a reduction in more carbon intensive travel. These outcomes are outside of the interests of private investors.

Explain what you are proposing to invest in and why the proposed interventions in the bid will address those challenges and barriers

The rationale for choosing this intervention in Halewood is clear.

As identified previously Halewood faces a number of specific challenges focused around

- Deprivation
- Health Inequalities
- Poor sustainable transport connectivity

The population of Halewood is just over 20,000 and is set to increase significantly by 20% as a result of ambitious plans for housing development to the east of Halewood.

Following the consultation for the East of Halewood Masterplan it became apparent that there was a genuine need for improvements in Halewood to help ensure Halewood meets the needs of existing and future residents.

The proposed interventions delivered together will act as catalyst to help regenerate Halewood. The proposals will help improve connectivity around Halewood linking residential areas to the district centre which will help to increase footfall supporting local employment, as well as creating a genuine mixed-use centre with opportunities for employment, leisure and recreation as well as providing access to essential services.

Halewood has an established district centre which originally expanded from a much smaller shopping parade. As a result of this, public wayfaring has developed sporadically, instead of in a more strategic fashion and there are opportunities to improve transport connectivity and public realm improvements. The current housing in the area can feel disconnected from the town centre with unattractive, indirect and poorly sign posted routes. Our proposals seek to directly address this issue and reconnect residents with the district centre

The District Centre is also performing well and there is demand for additional retail provision in the area. The Council has received a number of enquiries from a range of retailers including supermarkets looking to locate in Halewood looking to meet the needs of the expanding population.

The existing sports facilities within Halewood are in need of improvement and expansion to meet the current needs of the area. The facilities require modernising and there a requirement for additional playing pitch provision. As the population grows there will be an increase in demand with additional pressure is put on existing facilities.

The population of Halewood suffers with relatively poor health inequalities compared to the national average and the condition of existing sports facilities is identified as poor in terms of quality and quantity.

During the East of Halewood consultation a number of residents indicated they had a desire to exercise more and take part in fitness activities. However, there was a perception that the local facilities were inadequate. To help address this issue these proposals seek to improve the facilities within the existing Leisure Centre which should help encourage addition usage, as well as provide improved and additional sports pitches with modern facilities such as changing rooms, flood lighting and 3G pitches which are all aimed at supporting active lifestyles.

There are a number of active community clubs such as Grace Church-Halewood who run active community events aimed at supporting and engaging with the local community. These groups require additional facilities including both internal community space and sports pitches to continue undertake their activities to support the community of Halewood. Our proposals seek to meet this need by providing more flexible community space within the existing Leisure Centre, as well as additional sports pitches.

Knowsley Council is committed to achieving net zero and the Halewood Leisure Centre has been identified as being the most uneconomical in terms of CO2 emissions. The Council plans to keep the current Leisure Centre and as such has developed a full decarbonisation program.

Our interventions represent a genuine opportunity to help address the challenges faced in Halewood.

Through a package of active travel measure, improvements to the district centre and provision of high quality sports facilities we hope to improve active life expectancy, provide economic opportunities and help improve a sense of pride as well as helping to achieve net zero.

Upload Option Assessment report (optional)

How will you deliver the outputs and confirm how results are likely to flow from the interventions?

We have prepared a full Theory of Change assessment guided by the Magenta Book and the Monitoring and Evaluation guidelines offered as part of the LUF Technical Guidance. Our Theory of Change is appended at Appendix 6.

The 'Need' and 'Objectives' aspect of our Theory of Change are covered in earlier questions. We focus here on 'Outputs and 'Outcomes'.

The public sector financial inputs, through both the LUF and KMBC, are seeking to deliver a range of outputs and outcomes through the proposed interventions.

The key outputs delivered through the proposed interventions are:

- 19,615 sqm improved pedestrian/cycling routes – to include improved cycle and walking interventions to provide strong, green east to west connectivity between the new housing development and Wood Road Green Space, via Finch Woods, the Leisure Centre and the District Centre, and beyond to local employment and leisure facilities.
- 46,000 sqm of improved open space.
- 1 improved leisure centre – involving upgrades to the sports and leisure facilities including improvements to and decarbonisation of the existing leisure centre at the Halewood Leisure Centre site
- 1 new play area
- 5 new/improved leisure pitches. This includes new and improved playing pitches and open space facilities at Wood Road Green Space, and new and improved all weather playing pitches at the Halewood Leisure Centre site.
- The development of 2.0 ha of land to deliver an expanded retail and commercial offer in the centre of Halewood. Not subject to Levelling Up Funding but the catalyst for subsequent interventions. Will include 2,500 sqm new commercial (retail) floorspace.

The Results will flow directly from the Outputs, via the following main transmission mechanisms:

- The provision of new walking and cycling infrastructure will spark a behavioral change as walkers and cyclists become aware of the enhanced provision and start to trial its use. On the basis of a positive experience a range of positive impacts will flow, including improved journey quality, activity benefits (reduced death risk and reduced absenteeism) and mode shift benefits (reduced congestion) – all of which are quantified using the DfT's Active Mode Appraisal Toolkit (AMAT).
- The provision of the improved leisure centre/new leisure pitches/enhanced open space will trigger positive wellbeing impacts – monetised using the 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS).
- The new commercial development at the District Centre will transmit into a direct land value uplift effect on the land that is the subject of development.
- The whole package of works – new district centre, plus improved environment plus improved leisure assets - will generate enhanced perceptions of Halewood as a place to live and to invest – and as such trigger wider land value uplift effects
- The new public spaces will facilitate a range of community events – both formal and informal - which will generate amenity/social value and in turn enhanced pride in place and well-being.
- Community safety impacts will be driven by the improved environment with greater footfall and more natural surveillance.
- The improvements to decarbonize the Leisure Centre will reduce emissions and have a positive impact on air quality.

Set out how other public and private funding will be leveraged as part of the intervention

As part of the wider package of improvements the private sector will deliver an expansion of the District Centre to improve the local offer in Halewood. Due to the cost of relocating and improving the existing playing pitches, as well as the poor public environment this private sector funding is unlikely to come forward without the wider package of interventions.

If the proposed interventions are delivered additional public sector funding will be leveraged through the creation of additional cycle paths as Halewood is linked to the strategic cycle network which will be significantly expanded with proposals for further links to employment areas, as well as to the wider LCR.

If the existing Halewood Leisure Centre can be upgraded to ensure the building is fit for purpose and operates efficiently the Council does have future plans for further upgrades to the offer of the Leisure Centre.

Explain how your bid aligns to and supports relevant local strategies and local objectives for investment, improving infrastructure and levelling up

Vision

The Knowsley 2016 local plan set out a vision that by 2028, the Borough will be “known for its successful suburban townships that provide a sense of place and community, having sustainable, diverse, more prosperous and healthy populations”. The vision also contains a commitment that Halewood district centre would be “renewed and thriving”.

Local Strategic Context

Revitalising town and district centres is an important priority for Knowsley, and this is reflected both in policy and the work we have already done in the borough – including the delivery of Shakespeare North Theatre in Prescot and investments to improve Kirkby Town Centre. Our Halewood LUF project aligns with a key priority in our Knowsley 2030 strategy – to provide “thriving and welcoming high streets which are well used by local residents, businesses and visitors”. We set out in the strategy our ambition for community spaces to play a key part in the success of the borough by bringing together people of all ages and reducing social isolation. The strategy also prioritised taking advantage of economic growth opportunities, and recognises the importance activity, supported by access to green space and amenities, for mental health.

The Knowsley Council Plan 2022 sets out how the Council will work towards the priorities set out in the Knowsley 2030 strategy. The Council Plan prioritises delivery of the Borough’s ambitious town centre regeneration plans as being critical for delivering local economic growth ambitions, and inclusive growth that can benefit all residents. The Council plan also prioritises improving health and wellbeing.

The Knowsley Local Plan 2016 acknowledges the need for a broader range of retail and services in Halewood as well as the lack of good quality green space in the area.

A sustainable urban development is being delivered to the East of Halewood (also to the East of project area). The development is expected to deliver between 1,100 and 1,500 homes. The development’s Supplementary Planning Document is clear that encouraging the use of more sustainable transport will be an important consideration. Elements of the bid relating to green space and active travel are highly aligned with our LUF bid.

LCR Strategic Context

Knowsley is one of six local authorities making up the Liverpool City Region (LCR) and, the proposed development is consistent with LCR strategy. The proposals' emphasis on active transport are consistent with the city region's draft Local Transport Plan (vision and goals document) (LTP4) which prioritises "sustainable growth", and identifies the importance of increasing walking and cycling. This is supported by the Liverpool City Region Walking and Cycling Infrastructure Plan.

The bid will support the strategic priorities set out in the city region's Plan for Prosperity, which include creating a "clean, green, and affordable transport network" (with a focus on active travel), and revitalising town centres and community hubs. It is clear that investments in improving the public realm, improving green space, upgrading sports facilities, and enhancing active travel networks will be highly supportive of these priorities.

Explain how the bid aligns to and supports the UK Government policy objectives

Levelling Up

The evidence is clear that Halewood is in need of Levelling Up, and sits within a borough in Tier 1 of the Levelling Up Fund index. A significant number of Halewood's neighbourhoods are in the most deprived decile nationally (see earlier response).

Improving the appearance of the District Centre, renewing green space, and improving local leisure facilities will support the physical, human and social capitals that are identified in the LUWP, and will support the Levelling Up mission – "By 2030, the gap in Healthy Life Expectancy (HLE) between local areas where it is highest and lowest will have narrowed, and by 2035 HLE will rise by five years".

Public realm improvements will support the Levelling Up Mission to improve people's satisfaction with their town centre, and the improved facilities will support residents' engagement with their community. It is envisaged that the investment in the District Centre will attract an improved retail offer, generating overall benefits to the economy.

Environment

Knowsley Borough Council declared a climate emergency in Jan 2020 and aims to achieve net zero from the Council's estate and services by 2040. Active travel and green space elements of this bid reflect our commitment to environmental sustainability and the Government's own Net Zero Strategy. The plans will contribute to the Government's aim that half of journeys in cities and towns will be walked or cycled by 2030. Improvements to leisure facilities will also align to the Government's Net Zero priority to decarbonise buildings.

The Government's Clean Growth Strategy and Clean Air Strategy identify the importance of low carbon transport, including active travel. The Clean Growth Strategy also sets out measures to improve the energy productivity of businesses, including actions around improving the energy efficiency performance of buildings. The Halewood Leisure Centre has been identified as having high carbon emissions as a result of the building fabric and high gas reliance. The proposals include the installation of new air to water heat pumps to replace the existing gas fired boiler, as well as upgrades to the fabric of the building to make it more efficient. These measures are currently unviable without external funding.

Our proposals also include improvements to the cycling and walking network helping to encourage a shift towards sustainable means of transport. Through reduced reliance on vehicle journeys local air quality will be improved.

Health and Wellbeing

The plans will support the Government's vision for walking and cycling by helping to make places "truly walkable". The scheme is fully aligned with the Government's 2020 Cycling and Walking Plan for England (Gear Change). The Gear Change document calls for "Action not Words" and that is precisely what we seek to achieve. Gear Change has the ambition that "cycling and walking will be the natural first choice for many journeys with half of all journeys in towns and cities being cycled or walked by 2030" and the Halewood District Centre scheme is fully aligned with this Vision.

Alignment and support for existing investments

Where applicable explain how the bid complements or aligns to and supports existing and/or planned investments in the same locality

The East of Halewood Masterplan sets out the Council's ambitions to deliver up to 1,500 new homes on land located towards the east of Halewood. In February 2021 planning approval was granted to deliver 1,305 new homes by three different housebuilders which are now being built out. As part of the planning process significant S106 contributions were sought to deliver improvement to highways, open space, bus provision, new school places and improving local health care facilities.

The proposed cycleway works on Higher Road would complement the anticipated highway improvements works further along the road and provide a link between the new housing development of up to 1,500 houses and the Trans Pennine Trail.

Additional enhancements are also planned to the local Green Space at Finch Woods helping to provide a comprehensive walking and cycling network linking up the east and west of Halewood to the District Centre.

The new cycle network will also connect residents across Halewood to opportunities in the Halewood Ford vehicle transmission facility, which is currently in the process of investing £230 million to transform the site to provide electric power units for Fords all-electric passenger and commercial vehicles in Europe. This production will safeguard existing and create new jobs. Production is planned to start in 2024. The investment is subject to and includes U.K Government support through its Automotive Transformation Fund.

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

Our proposals for Halewood are heavily focused on improving active travel measures with a number of new walking and cycling links providing wider connections around Halewood to the District Centre and employment areas. This is being done to support the modal shift away to more sustainable means of transport.

Our proposals would fund new cycle and walking infrastructure connecting the town centre to residential areas. This will include links to the new housing development at Land East of Halewood. Appendix 1 shows how our proposed cycle links within Halewood will integrate to creating a new cycle network. This will be the first time a Halewood has had a comprehensive network.

We are also proposing to provide connections to the Trans Pennine Trail (TPT) which is a national trail connecting Southport to Hornsea.

In addition, a new cycleway is proposed along Higher Road which is currently a busy A road, which would link large residential areas to the Trans Pennine Trail therefore providing access to places of employment, leisure, commercial activity and education. All cycle infrastructure will be designed to LTN 1/20.

Confirm which Levelling Up White Paper Missions your project contributes to

Write a short sentence to demonstrate how your bid contributes to the Mission(s)

The main long-term impacts generated by our proposed Halewood project are increased living standards (LU Mission 1), increased well-being (LU Mission 8), increased pride in place (LU Mission 9), better Health outcomes (LU Mission 7), improved walking and cycling transport infrastructure (LU Mission 3) and improved community safety (LU Mission 11). Please see later responses on our Theory of Change framework for more detail on the impacts to be achieved.

Provide up to date evidence to demonstrate the scale and significance of local problems and issues

Halewood is the smallest of Knowsley's townships with a population of just over 20,000. Its population is likely to increase significantly (20%) due to housing development to the east of Halewood. The District Centre has been subject to some investment but is now at a point where reinvigoration is needed.

There are significant socio-economic issues in the Halewood. This, along with anticipated population growth, means that there is now a need for significant investment. Halewood faces six main challenges:

First, high levels of deprivation:

- Four of the 15 LSOAs comprising and surrounding Halewood are in the most deprived decile in England. Five are in the top decile for health deprivation (see Appendix 2, Fig 2).
- Halewood South is a "left behind area" according to the Local Trust.

Second, inadequate walking and cycling infrastructure / car dominance:

Local journeys are imbalanced towards car use, and there are challenges to walking and cycling in much of Halewood:

- Nine of the 15 Halewood LSOAs have longer walking journey times than the England average to the eight key services (as defined by the DfT). Eight of the LSOAs have equal to or worse journey times to key services by cycling than the England average.
- The Knowsley Local Plan recognises the need to develop sustainable transport infrastructure, in recognition of the isolation of Halewood from other parts of the borough.

Third, leisure & open space that is in need of investment:

There are opportunities to improve access to leisure facilities and green space in Halewood:

- The Knowsley Local Plan identifies that a shortage of good quality greenspace as an issue in Halewood.
- There were 3.5 visits to Halewood Leisure Centre by Knowsley residents per head of the Halewood population (2019/20). This is a lower rate than Knowsley overall (3.7 visits per head) and lower than for other leisure centres in the Borough.
- In 2018, there was a shortfall in provision of all forms of sport pitches in Halewood.
- In 2021/22, Halewood Leisure Centre was the third highest gas consuming building in the Council's asset stock and was the second highest consumer of electricity.

Fourth, health inequalities:

Public Health data shows that health outcomes in Halewood are worse than in

England overall:

- Life expectancy for men is lower in Halewood South (77.6) than in England overall (79.7). For women, life expectancy is also lower.
- The rates of death before 75, incidence of cancer, incidence of lung cancer, and rates of limiting long-term illnesses or disabilities are all higher in Halewood South than in England overall.
- 36.9% of people in Knowsley say they are inactive, taking less than 30mins of activity per week, compared to 27.2% in England.

Fifth, a District Centre in need of expansion:

Although there has been investment in the District Centre historically, this is now in need of reinvigoration:

- Knowsley's Local Plan sets out a spatial vision, including an ambition that Halewood District Centre will be "renewed and thriving".
- Recent consultation with the public (in relation to the East of Halewood SPD) revealed a number of issues, including that the existing retail facilities are too busy and lacking sufficient parking.

Sixth, low levels of Community Pride:

The Council's engagement with residents in 2018-19 showed that most Knowsley residents were happy in the area where they live, but also that there were some issues:

- The things people value most about the area where they live include, green/open spaces, proximity to shops, and transport links to the wider region.
 - But they disliked the lack of facilities/amenities, including leisure and the general offer of town centres, as well as transport issues.
-

Demonstrate the quality assurance of data analysis and evidence for explaining the scale and significance of local problems and issues

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- Halewood South is a "left behind area" according to the Local Trust.

Second, inadequate walking and cycling infrastructure / car dominance

Local journeys are imbalanced towards car use, and there are challenges to walking and cycling in much of Halewood:

- Nine of the 15 Halewood LSOAs have longer walking journey times than the England average to the eight key services (as defined by the DfT). Eight of the LSOAs have equal to or worse journey times to key services by cycling than the England average.
- The Knowsley Local Plan recognises the need to develop sustainable transport infrastructure, in recognition of the isolation of Halewood from other parts of the borough.

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There are opportunities to improve access to leisure facilities and green space in Halewood:

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- In 2018, there was a shortfall in provision of all forms of sport pitches in Halewood.
- In 2021/22, Halewood Leisure Centre was the third highest gas consuming building in the Council's asset stock and was the second highest consumer of electricity.

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- The things people value most about the area where they live include, green/open spaces, proximity to shops, and transport links to the wider region.
- But they disliked the lack of facilities/amenities, including leisure and the general offer of town centres, as well as transport issues.

Demonstrate that the data and evidence supplied is appropriate to the area of influence of the interventions

The small geography analysis referenced earlier covers the 15 LSOAs that comprise the wider Halewood township area (see Appendix 2). The three LSOAs intersecting the project and representing the project area (Halewood District Centre) are:

- E01006426 – encompasses the shopping area, Grace Park and the area around St Mark's Catholic Primary School.
- E01006427 – includes Beechwood Avenue, Oakwood Road and Woodland Road, which is the area of the planned cycle route towards Higher Road.
- E01006428 – covers the area containing the leisure centre as well as a larger area to the south of Higher Road, which includes the Ford Halewood Transmissions site.

Analysis has been undertaken of the wider Halewood township area (15 LSOAs) as this township area represents the functional residential catchment of the district centre, with residents of this wider area, utilising the district centre as their primary location for access to services and convenience goods.

The Middle Layer Super Output Areas analysed for the purposes of calculating

GVA are the four which include the project area and which cover Halewood.

- E020001343
- E020001344
- E020001345
- E020001356 – This area contains the shopping centre and Halewood Leisure Centre.

The two electoral wards for Halewood are included in the analysis of public health data. Halewood South is the area containing the project, and Halewood North includes some of the residential area to the north of the project.

Provide analysis and evidence to demonstrate how the proposal will address existing or anticipated future problems

We have prepared a comprehensive Theory of Change model (see Appendix 6).

Four quantifiable impacts, forecast using a suitable and robust model, have been identified as set out below:

- Transport benefits (AMAT) - A range of positive impacts will flow from the new walking and cycling infrastructure, including journey ambience, reduced risk of premature illness/death and congestion benefits.
- Leisure/Health Benefits – the wellbeing impact from additional physical activity at the improved leisure centre/leisure pitches/open space
- Land Value Uplift – the direct LVU arising from the new commercial (retail) development at an expanded district centre have been quantified.
- Wider LVU – the wider LVU arising from the package of interventions for existing commercial and residential properties within a 150m radius has been quantified.

The link between our activities and our quantifiable impacts is as follows:

- The provision of new walking and cycling infrastructure will spark a behavioral change as walkers and cyclists become aware of the enhanced provision and start to trial its use. On the basis of a positive experience a range of positive impacts will flow, including improved journey quality, activity benefits (reduced death risk and reduced absenteeism) and mode shift benefits (reduced congestion) – all of which are quantified using the DfT's Active Mode Appraisal Toolkit (AMAT).
- The provision of the improved leisure centre/new leisure pitches/enhanced open space will trigger positive wellbeing impacts – monetised using the 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS).
- The new commercial development at the District Centre will transmit into a direct land value uplift effect on the land that is the subject of development.
- The whole package of works – new district centre, plus improved environment plus improved leisure assets - will generate enhanced perceptions of Halewood as a place to live and to invest – and as such trigger wider land value uplift effects.

Our activities will also trigger a number of non-monetised benefits. The new public spaces will facilitate a range of community events – both formal and informal - which will generate amenity/social value and in turn enhanced pride in place and well-being. The improvements to decarbonize the Leisure Centre will reduce emissions and have a positive impact on air quality. Community safety impacts will be driven by the improved environment with greater footfall and more natural surveillance.

Describe the robustness of the analysis and evidence supplied such as the forecasting assumptions, methodology and model outputs

A robust forecasting model has been established to quantify economic benefits.

Property related impacts - land value uplifts - are modelled over a 10-year period, in line with Green Book guidance. Transport (AMAT) benefits are captured over a 30-year period as per TAG Guidance. Other health impacts are also modelled over a 30-year period for consistency with AMAT/TAG guidance.

We outline our methodology and forecasting assumptions below. We elaborate on these assumptions further in Appendix 6:

Transport Benefits

The scheme will provide some 19,615 sqm of new or improved pedestrian/cycling routes through Halewood. Using DfT's Active Mode Appraisal Toolkit (AMAT), the key modelled impacts are:

- Journey quality benefits which are benefits to new and existing cyclists or walkers as a result of improvements to infrastructure and can relate to a perception of improved safety and/or environmental conditions.
- Activity Benefits – these are benefits which individuals and society can derive from walking and cycling. We identify two main sources of benefits: mortality (reduction in relative risk of premature death due to physical inactivity) and absenteeism (reductions in absence from work).
- Mode shift benefits, which primarily surface in the form of reduced congestion. as a result of a reduction in vehicle kilometres.

Estimates of current levels of cycling have been derived from the DfT Propensity to Cycle Tool, using 2011 Census travel to work data for relevant Middle Super Output Areas in the absence of route-specific cycle counts or other sources of similar data. Estimates of future use are based on meeting the UK Government's target of doubling cycling levels by 2025 from a 2013 baseline.

Health Benefits

The provision of the improved leisure centre/new leisure pitches/enhanced open space will trigger positive wellbeing impacts – monetised using the 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS).

It is assumed that with the proposed leisure interventions in place, that the percentage of Halewood residents who are inactive (37%) reduces to the England average (27%) over the next 10 years and is then sustained at that level for the remainder of the appraisal period.

The reduction is applied to the current Halewood population and the proposed population expansion over the next 10 years.

The DCMS 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS) identifies a value of £1,127 in wellbeing effects for those residents taking part in some form of regular physical activity. This value, inflated to current prices, has been applied.

Land Value Uplift

Commercial land values, taken from Valuation Office Agency (VOA) – Land Value Estimates for Policy Appraisal 2019, have been used to estimate the increased land value arising from the investments at the District Centre. Prices were adjusted to 2022 prices using the latest GDP Deflators. A 'Change of Use' LVU estimation has been conducted which assumes a shift from 'Open Space' to 'Retail' on the proposed new retail led development. Displacement/deadweight/leakage (25% in total) adjustments have been applied.

Wider LVU

Wider LVU has been quantified over a 10-year period based on the benefits experienced by existing residential properties through the effects of the project. Average residential dwelling prices in the impact area LSOAs was obtained through ONS datasets. Using VOA data, the number of residential and commercial properties within the two closest LSOAs (Knowsley 20A and 20C). It was assumed that all residential properties within these two closest LSOAs of Knowsley 20A and 20C would be positively impacted by wider LVU benefits - this equates to an effective buffer zone of approximately 200 metres around Halewood District Centre.

Explain how the economic costs of the bid have been calculated, including the whole life costs

In order explain how the economic costs have been derived it is first necessary to outline the financial costs and their derivation:

Derivation of Financial Costs

In financial terms, the total cost of the project is £19,558,072.

Initial costings for highway works, improvements to open space, playing pitches and alterations to the leisure centre were initially undertaken by Council officers using comparative costs for similar projects delivered in the borough.

The costings for decarbonisation of Halewood Leisure Centre were undertaken by specialist consultants Pearson Surveyors to assist the Council achieve its net zero carbon targets.

To ensure these costings were accurate and to get accurate costs for additional elements of this project the Council appointed WSP who are a multi-disciplined engineering consultancy to provide additional costed design proposals and to review and update the previous costings. The costings work was undertaken by a chartered quantity surveyor.

A 10% contingency has been factored into our cost budgets.

An additional 10% for building works and 20% for infrastructure risk allowance has been factored in given the nature of the works.

Converting Financial Costs into Economic Costs

The following adjustments have been made to financial costs to arrive at economic costs:

- Costs have been apportioned over the appraisal period based on a phased delivery, with all LUF funding defrayed before March 2025;
- A discount rate of 3.5% has been applied to all economic costs in line with the requirements of the HM Treasury Green Book;
- All prices have been adjusted to 2022-23 prices using GDP Deflators; and
- Acknowledging that all costs in the Financial Cost include built in contingencies and risk allowances, an optimism bias of 24% has been applied to all costs based on the upper suggested limits as presented in the HM Treasury Green Book.

Based on the assumptions set out above, the total Economic Costs included in the Economic Case are £22,548,203.

Describe how the economic benefits have been estimated

Four quantifiable impacts, forecast using a suitable and robust model, have been identified as set out below:

- Transport benefits (AMAT) - A range of positive impacts will flow from the new walking and cycling infrastructure, including journey ambience, reduced risk of premature illness/death and congestion benefits.
- Leisure/Health Benefits – the wellbeing impact from additional physical activity at the improved leisure centre/leisure pitches/open space
- Land Value Uplift – the direct LVU arising from the new commercial (retail) development at an expanded district centre have been quantified.
- Wider LVU – the wider LVU arising from the package of interventions for existing commercial and residential properties within a 150m radius has been quantified.

Property related impacts - i.e land value uplifts - are modelled over a 10-year period, in line with Green Book guidance. Transport (AMAT) benefits and health benefits are captured over a 30-year period in the AMAT tool, as per TAG Guidance. Other health impacts are also modelled over a 30-year period for consistency with AMAT/TAG guidance.

We outline our methodology and forecasting assumptions below. We elaborate on these assumptions further in Appendix 6:

Transport Benefits

The scheme will provide some 19,615 sqm of new or improved pedestrian/cycling routes through Halewood. A consultant team from WSP modelled the positive impacts of this investment using the DfT's Active Mode Appraisal Toolkit (AMAT), a standard spreadsheet-based approach.

The key modelled impacts are:

- Journey quality benefits which are benefits to new and existing cyclists or walkers as a result of improvements to infrastructure and can relate to a perception of improved safety and/or environmental conditions.
- Activity Benefits – these are benefits which individuals and society can derive from walking and cycling are quantified in this assessment in line with research published by the World Health Organisation (WHO) which identifies two main sources of benefits: mortality (reduction in relative risk of premature death due to physical inactivity) and absenteeism (reductions in absence from work).
- Mode shift benefits, which primarily surface in the form of reduced congestion. as a result of a reduction in vehicle kilometres.

Estimates of current levels of cycling along the routes being assessed have been derived from the DfT Propensity to Cycle Tool, using 2011 Census travel to work data for relevant Middle Super Output Areas in the absence of route-specific cycle counts or other sources of similar data. Estimates of future use are based on meeting the UK Government's target of doubling cycling levels by 2025 from a 2013 baseline.

Health Benefits

The provision of the improved leisure centre/new leisure pitches/enhanced open space will trigger positive wellbeing impacts – monetised using the 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS).

It is assumed that with the proposed leisure interventions in place, that the percentage of Halewood residents who are inactive (37%) reduces to the England average (27%) over the next 10 years and is then sustained at that level for the remainder of the appraisal period.

The reduction is applied to the current Halewood population (20,116) and the proposed population expansion of +20% over the next 10 years.

The DCMS 2014 publication Quantifying and Valuing the Wellbeing Impacts of Culture and Sport (DCMS) identifies a value of £1,127 in wellbeing effects for those residents taking part in some form of regular physical activity. This value, inflated to current prices, has been applied.

Land Value Uplift

Commercial land values, taken from Valuation Office Agency (VOA) – Land Value Estimates for Policy Appraisal 2019, have been used to estimate the increased land value arising from the investments at the District Centre. Prices were adjusted to 2022 prices using the latest GDP Deflators. A 'Change of Use' LVU estimation has been conducted which assumes a shift from 'Open Space' to 'Retail' on the proposed new retail led development.

The floorspace of the total development plot, inclusive of car parking and landscaping, was used (21,000sqm). Displacement/deadweight/leakage (25% in total) adjustments have been applied.

Wider LVU

Wider LVU has been quantified over a 10-year period based on the benefits experienced by existing residential properties through the effects of the project. Average residential dwelling prices in the impact area LSOAs was obtained through ONS datasets. Using VOA and Council Tax: stock of properties data, the number of residential and commercial properties within the two closest LSOAs (Knowsley 20A and 20C). It was assumed that all residential properties within these two closest LSOAs of Knowsley 20A and 20C would be positively impacted by wider LVU benefits - this equates to an effective buffer zone of approximately 200 metres around Halewood District Centre.

The wider LVU calculation was based on a highly conservative 2% annualised growth rate in values and a deadweight rate of 25%

Provide a summary of the overall Value for Money of the proposal

A summary of the economic benefits for the Halewood LUF bid is presented below.

All benefits are expressed in real discounted prices (PVB):

Transport Benefits = £7,316,975

Health Effects = £31,424,090

Land Value Uplift (LVU) = £1,662,920

Wider LVU = £16,455,112

Total Benefits = £56,859,099

Total economic costs are:

Total Public Sector Costs = £19,926,896 (real discounted prices, PVC)

Total Private Sector Costs = £2,621,306 (real discounted prices, PVC)

The BCR is therefore: 2.72. This is based on the formula:

$BCR = \frac{\text{Total PV benefits} - \text{Total PV Private Sector Costs}}{\text{Total PV Public Sector Costs}}$

Appendix 6 provides a summary of how all benefits were monetised.

Upload explanatory note (optional)

Appendix 6 Theory of change and BCR.pdf

Have you estimated a Benefit Cost Ratio (BCR)?

Yes

Estimated Benefit Cost Ratios

Initial BCR 2.72

Adjusted BCR

Describe the non-monetised impacts the bid will have and provide a summary of how these have been assessed

Our proposed LUF activities will trigger a number of non-monetised benefits.

The improvements to decarbonize the Leisure Centre will reduce emissions and have a positive impact on air quality. This is a major source of benefit from the project, and at this stage remains unquantified/non-monetised.

The new public spaces will facilitate a range of community events – both formal and informal - which will generate amenity/social value and in turn enhanced pride in place and well-being.

Community safety impacts will be driven by the improved environment with greater footfall and more natural surveillance.

Provide an assessment of the risks and uncertainties that could affect the overall Value for Money of the bid

With regard to risks associated with the economic costs, as all costs have been estimated through a robust and comprehensive costing process, and include contingency plus risk allowance plus optimism bias then it is deemed

that no further sensitivity modelling is required. Adequate risk, contingency and optimism bias allowances mitigate any risks or uncertainties that could impact VfM.

In terms of economic benefits, the following risks and uncertainties could impact the overall VfM:

- The predicted increase in walking and cycling does not materialise
- The predicted increase in residents taking part in physical activity does not materialise.

A quantified sensitivity analysis has not been undertaken. However, it is anticipated that any combination of the above would not result in a substantial erosion to a central-case BCR that already stands at 2.72.

Upload an Appraisal Summary Table to enable a full range of impacts to be considered

Appraisal Summary Table 1

Upload appraisal summary table	Appendix 6 Theory of change and BCR.pdf
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Additional evidence for economic case

Additional evidence 1

Upload additional evidence	Appendix 6 Theory of change and BCR.pdf
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Confirm the total value of your bid

Total value of bid	£19558072
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Confirm the value of the capital grant you are requesting from LUF

Value of capital grant	£15356140
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Confirm the value of match funding secured

	£4201932
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Evidence of match funding (optional)	Appendix 8 SRO CFO.pdf
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Where match funding is still to be secured please set out details below

Knowsley Council are committed to contributing 10% of this cost with £1,955,807.

This funding comes from S106 funding secured to improve open space and

deliver transport and access improvements.

There will be a further private sector contribution of £2,246,125 towards the retail element of the wider proposals. The retail element of these proposals is currently viable without external funding and as such we are not seeking any Levelling Up Funding to support this element of the bid.

Land contribution

If you are intending to make a land contribution (via the use of existing owned land), provide further details below

Not applicable

Upload letter from an independent valuer

Confirm if your budget includes unrecoverable VAT costs and describe what these are, providing further details below

The budget does not include any unrecoverable VAT costs. The Council does not envisage any unrecoverable VAT costs at this stage of the project bid. The Council will however keep under review the VAT implications and costs on works associated within the bid as the scheme develops.

Describe what benchmarking or research activity you have undertaken to help you determine the costs you have proposed in your budget

Initial costs for our proposed interventions were derived from a number of separate sources, as set out below.

Costs for the new sustainable transport links (cycle paths and walking links) and costs for new tree planting and improvements to the highway were initially undertaken by officers in the Council's highways delivery team and are based on costs for similar works undertaken as part of the Sustainable Transport Enhancement Package, with uplifts for risk, known variables and contingency included.

The costs for works on the highway and public footpath have been estimated to include the cost of our contractor to conduct the works, costs of materials used, utility diversions and any costs for any requirements such as S278 agreements.

A separate report was undertaken by specialist consultants on behalf of the Council to investigate options for delivering improvements to Halewood Leisure Centre which included providing costs for decarbonisation works.

Additional costs for improvements to the Leisure Centre and delivering sporting playing pitches was undertaken by officers in the Council's Assets team using cost estimates for similar work. These costs estimates included assumptions for risk and contingency.

Costs estimates for other elements of our project, which had not been previously costed up, were undertaken recently by an independent quantity surveyor (at WSP) appointed by the Council. This included costs for the new retail provision, upgrades to the street-scene and improvement to the existing green spaces. To ensure consistency we also asked the same quantity surveyor to peer review all costs undertaken to date and these costs have been included in our final proposal.

To ensure our figures are robust a contingency has been provided to account for non-detailed/non specified elements of the proposal. The costings account for the costs of the works, contractor preliminaries, works undertaken by statutory undertakers and a risk allowance.

Provide information on margins and contingencies that have been allowed for and the rationale behind them

All cost estimates have been independently provided by an independent chartered quantity surveyor (at WSP).

A risk allowance of 10% has been applied to the proposed building works. Due to the greater level of risk associated with the proposed infrastructure works when working below existing ground level, a higher risk allowance of 20% has been applied to the infrastructure works.

An allowance of 10% has been included as a contingency for measurable items likely to form part of the works but not yet detailed at this stage and also for non-defined quantity extents and design specifications. As the design develops through to detailed design, the contingency allowance will be reduced.

This cost estimate has been prepared without the benefit of a contractor's programme therefore a percentage allowance of 30% has been included for contractors preliminaries.

An uplift of 3% has been applied for statutory undertakers (infrastructure only) given detailed site investigation have not yet taken place.

Describe the main financial risks and how they will be mitigated

The key financial risks identified are as follows. These risks are also repeated in our full Risk Register which is appended.

Stage of development. Our proposals are at a relatively early stage of development and so there are a number of unknown factors. An appropriate allowance for contingencies and a risk allowance has been included in our budget to try and mitigate this risk. In addition more detailed survey work will take place to further reduce this risk.

Delay in securing planning permission / suitable design. Both the LPA and qualified design teams have to date been engaged in the development of this project. This front loading will assist with reducing the risk of delays further down the process.

Sport England. At this relatively early stage of development we have not yet formally consulted with Sport England in regards to the relocation of the existing playing fields. Sport England will be consulted as part of the planning process and do have the right to object to the proposals. In preparing our proposals we have taken into account guidance issued by Sport England and have integrated their requirements into our proposals. We have also sought support from the existing sports clubs who currently use the playing fields and have designed are proposals around their requirements. As such our proposals include providing additionality regarding the number of playing pitches and an overall improvement in quality.

Tenders come in over budget. There is a risk that tenders will come in over budget. To account for this a suitable provision has been provided for a healthy contingency. Costs have also been assessed and peer reviewed by an independent quantity surveyor. As our proposals are further developed additional surveys will be undertaken to de-risk the proposals and any appropriate amendments to the design will be made to keep proposals within budget.

Supply of materials increasing due to unstable market, inflation and potential programme and cost implications. At this early design stage we have consulted with design professionals to ensure products specified are available on the market. Early procurement and sourcing / specifying of materials is required. Appropriate contingency is included within the budget.

Staff shortfalls. The Council has also invested £1M in the establishment of a Major Development Team in 2017. The purpose of this team is to provide a multidisciplinary dedicated resource to support proposals for major developments in the Borough, thereby accelerating the delivery of these schemes. This project will be managed by the Major Development Team, who are resourced to deliver.

Upload risk register

Appendix 7B Risk Register.pdf

If you are intending to award a share of your LUF grant to a partner via a contract or sub-grant, please advise below

This funding will be utilised in full by Knowsley Council who will directly appoint any external consultants and contractors required to undertake the works. All contracts will be awarded by the Council following the Council's contractual procedure rules.

As such the Council is fully compliant with subsidy control and procurement rules.

What legal / governance structure do you intend to put in place with any bid partners who have a financial interest in the project?

No bid partner will be involved in these works.

Summarise your commercial structure, risk allocation and procurement strategy which sets out the rationale for the strategy selected and other options considered and discounted

Commercial Structure

Knowsley Council is an effective and well-run local authority that has an established governance structure ensuring accountability and scrutiny with regards to decision making. The Council has an effective Council Plan which sets the strategic direction providing a clear focus. Knowsley Council follows a Leader and Cabinet model where each Cabinet member has responsibility for specific areas. The Council is fully committed to this project and will be the lead on delivery. The Council has sufficient resources to manage the delivery of this project and will bring in external consultant support where necessary.

Risk Allocation

All projects undertaken are assessed with regards to the level of risk. The Council has implemented a strategic risk management approach which uses the 'Alarm Risk Management Structure' and is fully consistent with the ISO 31000 family of standards and associated principles and guidelines on managing risks. A risk assessment has been undertaken using a risk matrix assessment technique to evaluate probability and severity of risks identified. Those with the highest levels of severity have been allocated additional mitigation factors.

Procurement Strategy

The Councils Constitution, specifically, the Contract Procedure Rules set out

the minimum requirements and standards that must be followed in the award of all contracts. This is supported by the Procurement Strategy, and our approach to Social Value. When advertised, we publish tender opportunities on the e-tendering portal The Chest.

Given the range and nature of projects involved in this submission, the approach to procurement will involve a number of separate contracts taking the appropriate procurement route depending upon the value of the contract. This blended approach will follow the competitive tender process and guidance contained within the Council's Contract Procedure Rules. This approach will ensure compliance whilst allowing speed where required to meet project delivery timescales. Using established methods, it will deliver value for money while taking an approach that is appropriate to the level of technical and operational risk.

This process will be managed by the Council.

The approach will incorporate open competitive tendering, and the use of appropriate existing national and regional frameworks (e.g. SCAPE, CCS).

Procurement will be delivered in line with public procurement regulations and other relevant legislation. Council activity will be carried out in line with published Contract Procedure Rules. Our approach to procurement will ensure competitive, transparent and fair processes and procedures take place. This will use existing best-practice approaches to:

- review the suitability of potential suppliers;
- undertake due diligence on suppliers, incorporating legislative checks such as modern slavery;
- review the financial position of the suppliers; and
- review the risks of the contract, incorporating into contract management where needed.

A procurement pipeline is being developed that will help plan procurement activity throughout the programme. It will ensure proactive and resourced procurement activity, with technical leads supported by the CIPS-qualified procurement team throughout the procurement cycle, including:

- undertaking market engagement activity;
- creating appropriate evaluation criteria with the right balance of quality, social value and price;
- sourcing goods, services and works;
- supporting value engineering discussions and negotiations where identified;
- agreeing contractual terms, performance criteria and quality measures; and
- management of the contract.

The Council also has its own Highways Term Contractor who may deliver the highway works depending upon the overall value.

To ensure transparency the Council publish information on awarded contracts over £5,000 on the Contracts Register on The Chest and also publishes other transparency data including spending over £500 in our publication scheme.

For lower value contract opportunities, the Council is taking steps to promote those opportunities with local suppliers.

A key objective in our approach towards procurement is to try and get as much benefit for our local communities as possible. The Council has developed an approach to embed a requirement for social value as an important criteria within tenders. The Council has a system for recording and monitoring how social value is achieved.

Our approach to the procurement and management will be open, transparent, non-discriminatory, and deliver excellent value for money. We will host "meet the buyer" events in the local area to encourage local SME's to become part of the supply chain. This will ensure that we are fully integrating our procurement strategy with our vision to enhance the local supply chain, further embedding this process in our wider management of the project.

The Council adheres to the Public Services (Social Value) Act 2012 which

requires public bodies operating solely in England to give due consideration to the inclusion of Social Value when commissioning goods, services, and works to which the Public Contracts Regulations 2015 apply. The Act does not alter the procurement process, however, it ensures that the public sector gives due consideration to the wider impact (social, economic, and environmental) of the requirements to be delivered.

The procurement documentation will include tender questions on how applicants will ensure that social value is addressed within their submissions. Knowsley Council is committed to achieving as much social value as possible in all procurement exercises and given the scale of our proposals for Halewood and potential transformational benefits this is particularly important. Bidders were encouraged to look at the Council's approach to social value.

Knowsley Council is committed to achieving a net zero target by 2040. This is 10 years earlier than the Government's aspirations to achieve net zero by 2050. Our procurement approach requires applicants to demonstrate how they can help us meet this commitment.

Who will lead on the procurement and contractor management on this bid and explain what expertise and skills do they have in managing procurements and contracts of this nature?

Knowsley Council have a well-established Major Development Team who will lead and coordinate the delivery of this project.

The Council will lead on the procurement and contractor management of the bid and will follow the Council's Contract Procedure Rules which align with the Government's public contract regulations 2015 and 2020 amendments.

A programme team will be set up involving the Council's procurement team, officers from the Major Development, Highways and Leisure departments.

Knowsley Council also has a well-established procurement department who are used to dealing with large and complicated procurement exercises. The Council spends approximately £90 million per annum on securing services, goods and works from third parties.

The Council has directly stepped into the market to successfully deliver major projects across the borough. This includes the delivery of Kirkby town centre, the Shakespeare North Playhouse and a number of housing developments.

The Council's procurement team are CIPS-qualified and the Council also has the ability to call on external consultants to support our procurement department as and when required. The Council works with and has access to procurement consultants working for STAR procurement who specialise in larger public sector procurement.

Are you intending to outsource or sub-contract any other work on this bid to third parties?

Knowsley Council plans to use a blended approach to deliver the proposals, including outsourcing or sub-contracting. Much of our activity will be delivered by sourcing suppliers through procurement.

The Council has very clear processes in place, allowing it to set tangible performance measures and manage them effectively in order to ensure quality. The procurement processes will incorporate best practices to identify quality outcomes and relevant key performance indicators, which will be confirmed during the tender process and mobilisation. Effective contract management processes and practices will ensure regular contract management meetings, reviewing progress against key performance indicators and quality assurance before agreeing mitigation activities where needed.

The Council is implementing a tool to measure, monitor and report on social value, which will be used across all LUF-related activity. Suppliers will also be procured to focus on social value identification and delivery for each work package, maximising the positive outcomes and added value of this activity throughout development.

Contractual terms and conditions will ensure legally robust arrangements, with clarity on how to remediate any performance issues in timely fashion. These terms and conditions will also allow the council to end contracts and reprocure quickly, as and where necessary.

Capability and capacity will be monitored through the application of sound project management arrangements.

Knowsley Council also has access to procurement consultants working for STAR procurement who specialise in larger public sector procurement.

Once the plans are delivered, the Council will operate and maintain the facilities with the exception of the retail expansion which will be delivered privately. It already has in-house capacity to do so – but any gaps in the capability or capacity to do so will be identified early through the project management methodology, and will be solved through:

- the effective procurement of new suppliers;
- the extension of existing contracts

Design work for this project will be outsourced to a number of specialist consultants. The design consultants will be appointed following the Council's Contract Procedure Rules.

Depending on the value of the various phases of highway construction works will either be undertaken by our Highways Term Contractor or if the value of the works is over the contract threshold then a construction contractor will need to be appointed via a competitive tender process.

Additional construction work for all aspects of our bid will be provided by a suitably qualified contractors who will be appointed following the Council's Contract Procedure Rules.

How will you engage with key suppliers to effectively manage their contracts so that they deliver your desired outcomes

Once a contract has been entered into, Knowsley Council will ensure that robust contract and supplier relationship management is undertaken in order to realise the full potential of the contract. The purpose of contract management is to work closely with suppliers to minimise costs and to maximise supply chain efficiencies throughout the life of the contract.

The contract itself will set out both customer and supplier obligations and information relating to the following management tools:

Key Performance Indicators (KPIs)

KPIs provide a mechanism to measure the four quadrants of the balanced scorecard (Quality, Cost, Sustainability, and Service). KPIs will assist the Council in understanding how well they and/or suppliers are performing against their strategic goals and objectives. Our contracts will have clear KPIs included. These are measurable outputs that the supplier must deliver in order to be successfully delivering the contract. Failure to meet these KPIs will have remedies attached to them, which should be invoked for poor performance.

Review Meetings

Review Meetings will be used to discuss, on a regular basis, the performance of the contract, and tackle any issues. These will be scheduled at appropriate intervals for the risks involved in the contract. For the contracts required to

deliver this project it will mean weekly catch up meetings (phone calls / virtual meetings) with monthly more formal review meetings.

Management Information (MI)

MI is used to monitor the supplier or contract performance. It ensures management have the information necessary to make effective strategic and operational decisions. It is important that your MI requirements are clearly defined and communicated to the supplier, ideally in the procurement documents as part of the competition process. Reporting arrangements must be fair and proportionate and not duplicate information already provided.

Measures to mitigate Risk will include:

Escalation: Each contract will identify what happens when the contract is not being delivered as agreed or, the agreed quality standards are not being met. Performance issues will be addressed immediately and escalated within the supplier organisation if not resolved promptly. The supplier will then be asked for an action plan to ensure that the required levels of service re-commence in a short time frame. If resolution of the issue is not completed within the timescales agreed then the issue should be escalated and the Council will engage and notify its Head of Procurement.

If the issues raised are subsequently not resolved to the Council's satisfaction, they will be escalated within both the supplier organisation and at the Council. The contract will contain details on the escalation procedure and to whom it shall be escalated. An early face-to-face meeting will be arranged where actions and timescales to remedy the situation can be agreed and implemented. The recovery actions should be monitored on a regular basis to ensure that the agreed recovery / resolution dates do not slip.

Incentives and sanctions: Incentives and sanctions will be used appropriately to maintain and improve the contract and supplier performance. These will be set out in the contract and relevant to the specific contract terms and conditions.

Incentives could include contract extension option as a longer contract opportunity could provide performance motivation. Payment by result, e.g. milestone payments (linked to defined deliverables) or reduced payment terms.

Sanctions could include retention to legitimately withhold payment if deliverables are not completed (with genuine and notified reason, but compliant with previously agreed contract terms and conditions). In worst case scenarios sanctions could lead to termination of the contract or legal action whereby the Council may seek damages as compensation upon a specific breach.

One approach to the higher risk contracts is the inclusion of Service Credits (these are a mechanism by which amounts are deducted from the amounts to be paid under the contract to the supplier if actual supplier performance fails to meet the performance standards set in the service levels).

For a sanction to be effectively enforced, sufficient evidence is required to justify the claim or action. The Council will ensure that clear records are kept, for example of agreed service levels, notice periods, reminders, communications or agreements

Set out how you plan to deliver the bid

We have prepared a separate Delivery Plan within Appendix 7A. Please also see Gantt Charts at Tab D in the Project Costings Workbook. We provide below some headlines from the Delivery Plan:

Key Milestones

2022 Activities

The following sequencing comprises the key milestones and will commence this financial year:

- Appropriate consultants will be appointed to further develop proposals and project Governance arrangements will be finalised
- In October a full public consultation will take place including all work packages within this project.
- A separate consultation will take place with all relevant stakeholders including Sport England, leisure users groups etc.
- Following any feedback from this consultation, proposals will be refined before moving to final design stage.
- Survey work will take place to better inform final designs
- For a number of the individual work packages a procurement exercise will take place to appoint contractors to carry out the required works
- Works on the decarbonisation and internal alteration of the Leisure Centre will start to take place.
- Expressions of Interest will be sought for the extension of the retail provision on the existing playing fields.

2023 – 2025 Activities

The following key milestones are phased for completion beyond the first year of the programme and will be complete by the LUF funding cut-off date, March 2025:

- Agree the final disposal of land and appropriate phasing of the extension of the district centre retail provision.
- Submit planning applications for sports pitch provision, external alterations to the Leisure Centre, expansion of the retail provision and other works.
- For some remaining work packages including the cycling and walking infrastructure, delivery contractors will be appointed and a phasing and mobilisation programme will be agreed.
- By June 2023 works on the creation of new cycleways will take start on site. This work will take place until the end of 2025 and will be phased to minimise disruption and be co-ordinated with our other work packages. Where required stopping up orders will be utilised.
- Internal works on the Leisure Centre will be completed by October 2023.
- Contractors will be appointed to start work on the external facilities including new sports pitches at the Leisure Centre and works will be completed by February 2024.
- For the retail expansion works on site will take place in January 2024 and will be completed by May 2025.

This project will move forward based on feedback provided during our consultation process.

The above timelines are considered to be realistic and deliverable but also include some allowances as a buffer for delays.

Roles and Interfaces

Knowsley Council will manage the master phasing and delivery of this project. There are a number of interlinked work packages which require careful consideration. In addition, the Council plans to ensure that end users such as sports clubs and leisure centre users do not lose access to facilities. It is also important to ensure that works do not adversely affect the flow of customers or operations of the existing district centre.

As such our timescales have been extended to allow a phased approach to delivery.

Knowsley Council have a well-established Major Development Team who will lead and coordinate the delivery of this project.

The Council will lead on and be responsible for all aspects of this project including procurement, finance, delivery etc.

Through a number of successfully delivered large scale projects the Council have demonstrated they have the necessary skills to deliver this project. In particular the Council has demonstrated its ability in delivery, funding, project management, governance, design, phasing and partnership working.

A Project Board and Steering Group will be set up involving the Council's procurement team, officers from the Major Development, Legal, Highways and Leisure departments and assets departments.

Project Monitoring

To monitor progress regular dashboards and action trackers will be produced and updated through the life of the project. The dashboard will highlight; high level information on overall progress of the scheme, the major risks that still need to be overcome, financial spend to date, a projected spend profile, a key milestone programme, a summary key actions undertaken in the last month and a summary of key actions to be undertaken the following month. It will be the responsibility of the project managers of the various phases that make up the overall project to update the dashboard on a monthly basis and forward it onto the scheme sponsor.

Action trackers will be used by the project managers of the various schemes to report on progress of all actions that need to be undertaken to successfully deliver the project, these should be updated at least on a monthly basis or more regularly if required. Any major issues or significant progress highlighted within the action tracker should be reported in the project dashboard.

Demonstrate that some bid activity can be delivered in 2022-23

As outlined in our Delivery Plan and workbook the Council will deliver bid activity in 2022-23.

We are planning to undertake a number of surveys and some preliminary works in 2022/23. We will also be appointing design consultants to prepare more detailed design work in readiness for consultation and procurement of contractors.

As proposals for the decarbonisation and internal works to the Leisure Centre have already been prepared if our application was successful, we will be able to appoint specialist contractors and start works on site before the end of the financial year.

Risk Management: Set out your detailed risk assessment

KMBC has implemented a strategic risk management approach that uses the 'Alarm risk management standard' and is fully consistent with the ISO 31000 family of standards and associated principles and guidelines on managing risks.

Risk assessment of this project has been undertaken using the Risk Matrix assessment technique to evaluate probability and severity of risks identified. Those with the highest levels of severity and probability have been allocated additional mitigation factors.

The key strategic risks and mitigations identified in the risk register are summarised below (full details are included in the appended Risk Register – see Appendix 7B). Further details on the financial risks are also detailed elsewhere in this application and are not repeated in this section:

- Public consultation results provide negative feedback. To mitigate against this early engagement with various public groups will be undertaken during the design stage.
- Reputational damage if our proposals are not delivered in entirety and they fail to have the full impact, particularly after undertaking a full public consultation on the proposals.
- Funding allocation is not spent within agreed timescales - should delays

occur which jeopardise the spend trajectory, the Council will programme and prioritise works to ensure Levelling Up Funding allocation is used as a priority.

- Utility costs are higher than accounted for in the submission or unchartered utility services are encountered during construction. To mitigate against this C2, C3 and C4 surveys will be undertaken during the design phase, as well as undertaking trial holes where necessary.

Management of risk

Each KMBC Major Regeneration Project has a senior executive officer as project sponsor, who owns the vision and the objectives and is ultimately accountable for the programme. The project sponsor for Halewood is KMBC's the Council's Executive Director of Regeneration & Economic Development who:

- Owns the overall strategic plan for the programme and provide overall strategic advice;
- Owns the overall Strategic Risks;
- Establishes the Programme Scope and agrees the Governance arrangements;
- Establishes Resources and Programme Tolerances;
- Engages with Key Partners at a senior level; and,
- Sets Timescales, Cost and Quality Outcomes.

Advice and support is provided via quarterly Regeneration Board meetings and through the Council's decision-making process of Majority Officer Group, Ward Members, Portfolio Holders and Cabinet.

Day to day management of strategic risks are allocated to a specified 'Risk Manager' – either a named officer within KMBC's internal project team. Detailed day to day risk management processes will be implemented in partnership with the Development Partner, consistent with standard project management risk monitoring processes. A detailed risk register has already been established looking at all aspects of the project life cycle which will be regularly updated.

Provide details of your core project team and provide evidence of their track record and experience of delivering schemes of this nature

Knowsley Council have a well-established Major Development Team who will lead and coordinate the delivery of this project.

A Project Board and Steering Group will be set up involving the officers from the Major Development, Highways, Procurement, legal and Leisure and assets departments. Additional officers will be brought in as and when required.

The Council's track record of securing external funding and delivering high profile and high-quality schemes is excellent. The appended LUF Delivery Plan – see Appendix 7A - sets out some of the high-profile experience Knowsley Council has with delivering physical regeneration schemes of a similar nature to that proposed within this bid. Most notably, these include:

Shakespeare North Playhouse: An iconic new theatre, education, outdoor performance garden and an exhibition space in the heart of Prescott Town Centre. Shakespeare North will be a major visitor attraction, providing a distinctive asset for the Liverpool City Region, and a significant regenerative and place shaping opportunity for Prescott. The Council appointed Kier Construction as the preferred construction partner in January 2018 and the project opened in 2022, the Borough's Year of Culture. The development, which attracted Liverpool City Region Combined Authority (LCRCA) Funding of more than £10.5m, has acted as a catalyst for a number of other regeneration projects in Prescott including significant public realm improvement works and a further £8m investment from the LCRCA for major upgrades to Prescott Station.

Kirkby Town Centre: In 2019, Knowsley Council acquired St Modwen's

interests in Kirkby Town Centre with the sole purpose of enabling the regeneration of the town centre that had significantly stalled due to private land ownership. The Council retained St Modwen as its development partner to deliver the new retail development comprising floor space of 94,000 sq. ft. and thereby enabling a new Morrisons supermarket and associated new retail facilities to open in 2021. Just 18 months after the Council took over ownership of the town centre, the development is now nearing completion with lettings to KFC, Taco Bell and TJ Morris (Home Bargains). With 74,000 sq. ft. of space already let (78%), the partnership with St Modwen's will deliver, a retail development that will create 500 jobs and generate a £15.3m boost to the local economy each year.

In addition, the Council also have an established track record for delivering sustainable transport schemes and public realm enhancements over the last decade. This includes the Sustainable Transport Enhancement Package works worth approximately £5m, and improvements to the street-scene in Prescot worth £8million. The Council have successfully delivered a number of improvement works around town centres within budget, on time and with minimal disruption to businesses

Set out what governance procedures will be put in place to manage the grant and project

The Council's Chief Financial Officer has provided confirmation of adequate assurance within the Council and has signed the Chief Financial Officer Declaration. We set out below the governance and assurance structures that will be used, and associated procedures.

Structures

The Governance of the project will be set out as follows:

Project Board

Strategic management decisions and the direction of the development will be made by the Project Board. The group will adopt and implement best practice in relation to government and risk management and ensures the development stays on track in meeting objectives. The Project Board will contain senior officers with all decisions being made unanimously. The decisions, steer and objectives would then be passed to the Project Director who will be responsible for communicating with the wider team.

With support from the project Steering Group (see below), the Project Board will identify a development strategy at the beginning of the beginning of the project that will view the project as a whole, including design, development and construction.

The SRO will be responsible for providing approvals and decisions that affect progress/delivery and the corporate approval and financial sign off via the Gateway stage review process. To fulfil these responsibilities the SRO will be supported by the Project Board. The SRO takes executive responsibility for decisions relating to the programme and will chair the Project Board.

Steering Group

The project Steering Group, which will be made up of a wider group of stakeholders who have an interest in the project and want to steer development. The group will be responsible for the overall direction of travel of the entire project.

Procedures and Systems

Knowsley Council has the following assurance systems in place to ensure a disciplined approach to the evaluation and improvement of risk management and assurance in programme delivery:

Gateway Reviews:

- The Council's Constitution ensures that the requirement of Elected Member

and Senior Officer approvals would be obtained at various Gateway stages of the programme.

- Specific Programme Board with own terms of reference regarding approval requirements.

Internal Support Services:

- Financial Management Service providing robust Capital & Revenue budget monitoring & reporting requirements.
- Statutory Internal Audit service providing grant claim assurance and contract audit assurance functions.
- Counter Fraud Team.
- Procurement Team.
- Policy & Performance Team.
- Legal Support.

The above internal support resources will be wrapped around the delivery programme.

To monitor progress regular dashboards and action trackers will be produced and updated through the life of the project. The dashboard will highlight; high level information on overall progress of the scheme, the major risks that still need to be overcome, financial spend to date, a projected spend profile, a key milestone programme, a summary key actions undertaken in the last month and a summary of key actions to be undertaken the following month. It will be the responsibility of the project managers of the various phases that make up the overall project to update the dashboard on a monthly basis and forward it onto the scheme sponsor.

Action trackers will be used by the project managers of the various schemes to report on progress of all actions that need to be undertaken to successfully deliver the project, these should be updated at least on a monthly basis or more regularly if required. Any major issues or significant progress highlighted within the action tracker should be reported in the project dashboard.

If applicable, explain how you will cover the operational costs for the day-to-day management of the new asset / facility once it is complete to ensure project benefits are realised

The Council is aware that operational costs are not covered by LUF and have prepared this bid with this in mind.

Once any highways works have been completed including new cycleways they will be maintained through the Council's highways maintenance budget. As our proposals involve improvements to the existing ageing infrastructure there should be a reduction in the amount of maintenance work required in the short term.

The ongoing maintenance costs for the open space, sports pitches at the leisure centre and internal improvements to the leisure centre will be met by the Council which has existing maintenance budgets.

The playing pitches on the existing open space will be leased to the existing sports clubs and the club will be responsible for future maintenance in accordance with their lease agreement. When this lease terminates future maintenance will revert back to the Council.

When the extension of the district centre is complete this facility will become a private asset with future maintenance responsibilities being met by a private sector owner. As part of the Council's asset disposal process the council will require assurances that new owner will maintain all assets in a fit and proper manner. Appropriate clauses and covenants will be used to enforce this.

**Upload further information
(optional)**

Set out proportionate plans for monitoring and evaluation

This Monitoring and Evaluation (M&E) Plan outlines the approach for monitoring and evaluating the Halewood District Centre LUF project. It includes the following:

- The M&E objectives and the key research questions that will need to be addressed;
- An outline of the M&E approach;
- An overview of key metrics for M&E which we will use to monitor performance and assess impacts; and
- Resourcing and governance arrangements for bid level M&E.

The M&E Plan follows best practice and can be updated to reflect the specific M&E requirements for the LUF when this is published. This M&E plan should be read in conjunction with Table E in the LUF Planning workbook.

M&E Objectives

The bid level M&E objectives are to:

- collect timely monitoring data that will allow us to assess progress and determine whether project activities are being delivered on time and on budget;
- assess the extent to which the LUF bid objectives are met;
- assess and where possible quantify the social and economic impact of the intervention, and its value for money; and
- understand the reasons for under or over-performance and the lessons that can be learned for future interventions.

The M&E approach will address the following research questions:

- Was the intervention based on a sound rationale and was it consistent with the local policy priorities?
- Did the project meet all its milestones for delivery? If not, what are the reasons for this?
- Did the project meet its financial, activity and output related delivery targets? What are the reasons for under or over performance?
- Did the structures and processes put in place for project delivery work effectively or how these could be improved?
- Has there been a measurable change in intended outcomes, and to what extent can this be attributed to the intervention as opposed to other factors?
- What was the total cost of the intervention? Did the social and economic benefits justify the costs?

M&E Approach

Monitoring

Monitoring of performance will be carried out internally by Knowsley Council (see resourcing and governance arrangements below).

We will:

- collect relevant baseline data to benchmark our performance;
- identify milestone dates for completion of key project activities and monitor progress against these dates, working with the appointed contractor;
- carry out systematic monitoring of relevant indicators on expenditure and outputs as set out in this M&E Plan; and
- keep records of relevant secondary information to track changes in outcomes and impacts.

All information will be stored in a single database, allowing us to report on progress internally and externally at regular time intervals.

Evaluation

We will commission an independent evaluation to assess the impact and effectiveness of the project. The timing of this evaluation will need to be agreed once the M&E requirements of LUF are clearer. This will have an important bearing on the scope of the evaluation as it will take some time for changes in a number of outcomes to emerge.

We expect that this will be a single stage ex-post evaluation. The tasks will be determined by the independent evaluators but we expect this to include the following:

- Review of policy documents and supporting evidence to assess whether the intervention was based on a sound rationale
- Analysis of all monitoring data to assess over or under performance against targets;
- Consultations with the delivery team members and other stakeholders;
- Beneficiary surveys, which could include new users of the proposed leisure facilities and new walking and cycling infrastructure.

We have considered the use of counterfactual impact evaluation approaches. However, we do not believe this is feasible given the nature of the intervention and the fact that it could take a long time for impacts to emerge.

Monitoring and Evaluation Indicators

A comprehensive schedule of monitoring and evaluation indicators is provided in Table E in the LUF Planning Workbook. We provide below a summary of the main indicators in bullet point format. The source/method of data collection for each indicator is provided in Table E of the Planning Workbook.

- Baseline indicators – will include current provision of leisure and open space and usage, baseline physical activity measures, current propensity to walk and cycle, emissions from Leisure Centre and Community perceptions.
- Input / Expenditure indicators – will include £ spent directly on project delivery (by local authority) and £LUF funding spent on project delivery.
- Delivery Milestone indicators will include - % of work packages started on time, % of work packages completed on time.
- Output indicators – will include number of new leisure pitches/play areas, new commercial floorspace, sqm of new walkway/cycleway, sqm of new/improved open space and number of improved leisure centres.
- Outcome indicators – AMAT-based walking and cycling benefits, health benefits arising from increased physical activity, air quality impacts and change in land values in Halewood attributable to the intervention.
- Impact indicators – will include improved living standards, improved well-being, improved transport infrastructure, improved pride in place and improved community safety.

Resourcing and Governance Arrangements

M&E will be led by the project manager (PM) appointed by Knowsley Council to oversee the capital project. The PM will be tasked with developing monitoring systems and a framework for contractors to report on progress against milestones. A number of different officers may be involved in collection of monitoring data (e.g. financial spend and progress against milestones) but this will be reported back to the PM who will be responsible for storing data and analysing progress. The PM will report to back to Knowsley Council and the internal team established to oversee the LUF programme.

Knowsley Council is committed to covering the costs of a final evaluation. The evaluators will be appointed through a competitive procurement exercise and will report to the PM. We will also convene an evaluation steering group to provide oversight and a critical review of the evaluation's findings and recommendations.

Senior Responsible Owner Declaration

Upload pro forma 7 - Senior Responsible Owner Declaration

Appendix 8 SRO CFO.pdf

Chief Finance Officer Declaration

Upload pro forma 8 - Chief Finance Officer Declaration

Appendix 8 SRO CFO.pdf

Publishing

URL of website where this bid will be published

<https://www.knowsley.gov.uk/news/news-and-press-releases>

Additional attachments

Additional file attachment 1

Upload attachment

Appendix 1 Scheme Visualisations.pdf

Additional file attachment 2

Upload attachment

Appendix 2 Location Maps and Data Tables.pdf

Additional file attachment 3

Upload attachment

Appendix 3 MP Support.pdf

Additional file attachment 4

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Appendix 4 State Aid.pdf

Additional file attachment 5

Upload attachment

Appendix 6 Theory of change and BCR.pdf

Additional file attachment 6

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Appendix 7B Risk Register.pdf

Additional file attachment 7

Upload attachment

Appendix 7A Delivery Plan.pdf

Additional file attachment 8

Upload attachment

Appendix 8 SRO CFO.pdf

Additional file attachment 9

Upload attachment

Appendix 5 Letters of Support.pdf
