



West  
Yorkshire  
Combined  
Authority

Tracy  
Brabin  
Mayor of  
West Yorkshire

## WEST YORKSHIRE COMBINED AUTHORITY

MEETING TO BE HELD AT 10.00 AM ON THURSDAY, 14 MARCH 2024  
IN COMMITTEE ROOM 1, WELLINGTON HOUSE, 40-50 WELLINGTON  
STREET, LEEDS

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### A G E N D A

Please note that this meeting will be filmed for live or subsequent broadcast via the Combined Authority's internet site. At the start of the meeting the Chair will confirm if all or part of the meeting is being filmed. Generally, the public seating areas will not be filmed; however, by entering the meeting room and using the public seating area, you are consenting to being filmed and to the possible use of those images and sound recordings for webcasting. If you have any queries regarding this, please contact Governance Services on 0113 251 7220.

1. **APOLOGIES FOR ABSENCE**
2. **DECLARATIONS OF DISCLOSABLE PECUNIARY INTERESTS**
3. **EXEMPT INFORMATION - POSSIBLE EXCLUSION OF THE PRESS AND PUBLIC**
  1. To highlight Agenda Item 13d, Appendix 9 – Zero Emission Bus Regional Area (ZEBRA) (listed as 13d(10) on the agenda) which officers have identified as containing exempt information within the meaning of Schedule 12A to the Local Government Act 1972, and where officers consider that the public interest in maintaining the exemption outweighs the public interest in disclosing the information, for the reasons outlined in the report.
  2. To consider whether or not to accept the officers' recommendation in respect of the above information as set out Agenda Item 13d, Appendix 9 – Zero Emission Bus Regional Area (ZEBRA).

3. If the recommendation is accepted, to formally pass the following resolution:-

**RESOLVED** – That in accordance with paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972, the public be excluded from the meeting during consideration of Agenda Item 13d, Appendix 9 – Zero Emission Bus Regional Area (ZEBRA) on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if members of the press and public were present there would be disclosure to them of exempt information and for the reasons set out in the report that in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

#### **4. MINUTES OF THE MEETING OF THE COMBINED AUTHORITY HELD ON 1 FEBRUARY 2024**

(Pages 1 - 10)

##### **For Decision**

#### **5. BUS REFORM**

(Lead Member: The Mayor, Director: Simon Warburton)  
(Pages 11 - 42)

#### **6. WEST YORKSHIRE MASS TRANSIT: OUTCOMES FROM THE FIRST STRATEGIC OUTLINE CASE IN ADVANCE OF SUBMISSION TO THE DFT AND SUBSEQUENT CONSULTATION AND ENGAGEMENT ACTIVITIES**

(Lead Member: The Mayor, Director: Luke Albanese)  
(Pages 43 - 54)

#### **7. BETTER HOMES HUB**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 55 - 62)

#### **8. WEST YORKSHIRE HOUSING STRATEGY 2040**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 63 - 132)

#### **9. RAIL STRATEGY**

(Lead Member: Councillor Hinchcliffe, Director: Simon Warburton)  
(Pages 133 - 138)

#### **10. LOCAL TRANSPORT PLAN**

(Lead Member: Councillor Hinchcliffe, Director: Simon Warburton)  
(Pages 139 - 144)

#### **11. ECONOMIC STRATEGY**

(Lead Member: The Mayor, Director: Felix Kumi-Ampofo)  
(Pages 145 - 168)

## **12. WORKING TOWARDS A CHILD FIRST APPROACH IN THE COMBINED AUTHORITY**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 169 - 176)

## **13. PROJECT APPROVALS**

### **13a INVESTMENT ZONE PROGRAMME APPROVALS - INVESTMENT PRIORITY 3 - CREATING GREAT PLACES AND ACCELERATED INFRASTRUCTURE**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 177 - 200)

#### **13a (1) Enterprise West Yorkshire**

#### **13a (2) West Yorkshire HealthTech and Digital Tech Investment Zone Programme**

### **13b LOCAL NATURE RECOVERY STRATEGY PROJECT APPROVALS - INVESTMENT PRIORITY 3 - CREATING GREAT PLACES AND ACCELERATED**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 201 - 212)

### **13c BETTER HOMES HUB PROJECT APPROVALS - INVESTMENT PRIORITY 4 - TACKLING THE CLIMATE EMERGENCY AND ENVIRONMENTAL**

(Lead Member: The Mayor, Director: Liz Hunter)  
(Pages 213 - 234)

#### **13c (1) Better Homes Hub (BHH) Area-Based Scheme (Leeds - Part 1)**

#### **13c (2) Better Homes Hub**

### **13d PROJECT APPROVALS - INVESTMENT PRIORITY 5 - DELIVERING SUSTAINABLE, INTEGRATED, INCLUSIVE AND AFFORDABLE TRANSPORT**

(Lead Member: The Mayor, Director: Simon Warburton)  
(Pages 235 - 374)

#### **13d. (1) BCPC Kings Road Sustainable Transport Corridor**

#### **13d. (2) Bus Highway Hotspot Improvements Programme (BSHHIP)**

#### **13d. (3) Huddersfield Rail Station Connections**

**13d. (4) TCF Dewsbury - Batley - Chidswell Sustainable Travel Corridor**

**13d (5). Harrogate Railway Station Gateway - Active Travel Improvement Scheme**

**13d (6). TCF: Skipton Railway Station Gateway - Active Travel Improvement Scheme**

**13d (7). TCF Selby Station Gateway**

**13d (8). Kirklees Speed Limit Review**

**13d (9). A58/A672 Corridor Improvement Scheme**

**13d (10). Zero Emission Bus Regional Area (ZEBRA)**

**13d (11). Active Travel Fund and Capability Fund Programme - Active Travel Fund 4 Extension and Capability Fund Extension**

**13e PROJECT APPROVALS - INVESTMENT PRIORITY 6 - CREATIVE INDUSTRIES, CULTURE, HERITAGE AND SPORT**

(Lead Member: The Mayor, Director: Felix Kumi-Ampofo)  
(Pages 375 - 400)

**13e (1). West Yorkshire Tourism - Local Visitor Economy Partnership (LVEP)**

**13e (2). Bradford 2025 UK City of Culture**

**13e (3). British Library North**

**14. SCRUTINY PROTOCOL REVIEW**

(Lead Member: The Mayor, Director: Alan Reiss)  
(Pages 401 - 452)

**15. CORPORATE PLAN 2024-25**

(Lead Member: The Mayor, Director: Alan Reiss)  
(Pages 453 - 480)

**16. CORPORATE DELEGATIONS**

(Lead Member: The Mayor, Director: Ben Still)  
(Pages 481 - 484)



## For Information

### 17. MINUTES FOR INFORMATION

(Lead Member: The Mayor, Director: Alan Reiss)

(Pages 485 - 486)

### 18. DATE OF THE NEXT MEETING

The date of the next meeting, which shall be the Combined Authority's Annual Meeting, will be Thursday 20 June 2024.

Signed:

A handwritten signature in black ink, appearing to be 'BAM', with a horizontal line underneath it.

**Chief Executive  
West Yorkshire Combined Authority**

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**MINUTES OF THE MEETING OF THE  
WEST YORKSHIRE COMBINED AUTHORITY  
HELD ON THURSDAY, 1 FEBRUARY 2024 AT COMMITTEE ROOM 1,  
WELLINGTON HOUSE, 40-50 WELLINGTON STREET, LEEDS**

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**Present:**

Mayor Tracy Brabin (Chair)	West Yorkshire Combined Authority
Councillor Susan Hinchcliffe	Bradford Council
Councillor Jane Scullion	Calderdale Council
Councillor Cathy Scott	Kirklees Council
Councillor James Lewis	Leeds City Council
Councillor Rebecca Poulsen	Bradford Council
Councillor Alan Lamb	Leeds City Council
Mandy Ridyard	West Yorkshire Business Board
Councillor Stewart Golton (Substitute)	Leeds City Council

**In attendance:**

Ben Still (Chief Executive)	West Yorkshire Combined Authority
Alan Reiss (Chief Operating Officer)	West Yorkshire Combined Authority
Simon Warburton (Executive Director)	West Yorkshire Combined Authority
Melanie Corcoran (Director)	West Yorkshire Combined Authority
Sarah Eaton (Director)	West Yorkshire Combined Authority
Angela Taylor (Director)	West Yorkshire Combined Authority
Caroline Allen (Deputy Director)	West Yorkshire Combined Authority
Fatima Khan-Shah (The Mayor's Inclusion Champion)	West Yorkshire Combined Authority
Ben Kearns (Committee Services Officer)	West Yorkshire Combined Authority

**1. Apologies for Absence**

Apologies for absence had been received from Councillor Sue Holdsworth (Calderdale Council), Councillor Denise Jeffery (Wakefield Council) and Councillor Claire Douglas (York Council).

Councillor Stewart Golton (Leeds Council) attended the meeting in place of Councillor Sue Holdsworth.

**2. Declarations of Disclosable Pecuniary Interests**

Councillor Scullion declared an interest in concessionary fares as she was in receipt of one for senior citizens.

### 3. Exempt Information - Possible Exclusion of the Press and Public

There were no items that required the exemption of the press and public.

### 4. Minutes of the Meeting of the Combined Authority held on 7 December 2023

**Resolved:** That the minutes of the meeting of the Combined Authority held on 7 December 2023 be approved as a correct record.

### 5. Business Planning and Budget 2024/25

The Combined Authority considered a report of the Director of Finance and Commercial Services setting out the budget and business plans for 2024/25.

The difficult financial context for both the Combined Authority and Local Authorities was considered in setting the budget and it was noted that the proposals included that the transport levy would be frozen.

Councillor Lamb proposed that the transport levy be reduced by £10m and a commitment that £7.5m of unallocated gainshare funding be distributed to the Local Authorities to mitigate their budgetary pressures. Members voted on the proposed amendment to recommendation 10.5 in the submitted report. The amendment was rejected by majority vote.

It was reported that £51m had already been redistributed to partner Councils from the West Yorkshire Plus Transport Fund reserve. Members discussed the role of the Combined Authority in progressing a strategic transformative vision for the region as well as the need for longer term funding from Government for Local Authorities.

Members discussed the budget implications of Bradford Interchange Bus Station which would be monitored and reported as part of the regular finance updates to the Finance, Resources, and Corporate Committee.

Members voted on the budget, which was passed with Councillor Lamb and Councillor Poulson voting against, and Councillor Golton abstaining.

#### **Resolved:**

- i. That the 2024/25 Business Plans be approved.
- ii. That the revised outturn revenue budget for 2023/24 be approved
- iii. That the proposed revenue budget for 2024/25 be approved.
- iv. That the indicative capital programme and funding for 2023/24 - 2026/27 be approved.
- v. That, in accordance with the powers contained in the Local Government Finance Act 1988 (as amended) and by virtue of article 9(6) of the West Yorkshire Combined Authority Order and the

Transport Levying Bodies Regulations 2015 (as amended), a levy of £102 million be determined for the year ended 31 March 2025.

- vi. That the Director, Finance and Commercial Services be authorised to issue the levy letter in respect of the financial year ending 31 March 2025 to the five District Councils in West Yorkshire.
- vii. That a payment of £4,099,410 be made to the five District Councils in accordance with Table 3 of the submitted report.
- viii. That authorisation be given to the Director, Finance and Commercial Services to arrange appropriate funding for all expenditure in 2023/24 and 2024/25 subject to statutory limitation, including the most appropriate application of capital funding as set out in the report.
- ix. That the capitalisation approach set out in the paper be approved.
- x. That the adoption of the CIPFA Code of Practice for Treasury Management in Public Services be reaffirmed.
- xi. That the treasury management policy as set out in Appendix 6 of the submitted report be approved
- xii. That the prudential limits for the next three years as set out in Appendix 6 of the submitted report be adopted.

## **6. UK Shared Prosperity Fund**

The Combined Authority considered a report of the Director of Strategy, Communications and Intelligence on the progress made on implementing the West Yorkshire UKSPF Local Investment Plans, including Core UKSPF, Multiply, and the Rural England Prosperity fund.

Members discussed the need to further promote the rural investment fund to ensure an increase in successful applicants.

### **Resolved:**

- (i) That progress made on implementing the West Yorkshire UKSPF Local Investment Plans, including Core UKSPF, Multiply and the new Rural England Prosperity Fund (“The Rural Fund”) be noted.
- (ii) That approval be delegated to the Chief Executive, in consultation with the Mayor, to authorise the final list of successful projects selected in response to the UKSPF Pillar 3: People and Skills Invitation to Bid following the conclusion of the assessment process and endorsement from the UKSPF Local Partnership Group to a maximum of £10,000,000, to allow delivery to commence April 2024.

- (iii) That the progress on delivering the Rural Fund, as outlined at paragraph 2.24 of the submitted report be noted and the changes to the operating model set out at paragraph 2.30 be noted.

## **7. Level 4 Devolution**

The Combined Authority considered a report of the Director of Strategy, Communications and Intelligence providing an update on the West Yorkshire response to the Level 4 Devolution Framework and the submission to Government.

Members discussed the opportunities presented by the Level 4 Devolution Framework and noted that an initial application had been submitted to Government by the deadline of 31 January.

### **Resolved:**

- i. That the recent publication of the Government's Level 4 Devolution Framework setting out guidance and the powers and flexibilities on offer through a Level 4 Devolution Deal be noted.
- ii. That the work that has taken place across the partnership to consider the opportunities presented through the Level 4 Devolution Framework and the activity undertaken to develop the West Yorkshire response be noted.
- iii. That the ongoing Scrutiny Protocol review and the report due for submission to the 14 March 2024 Combined Authority meeting be noted.
- iv. That the Deputy Director of Legal, Governance and Compliance be authorised to convene an Independent Remuneration Panel to make any recommendations to the Combined Authority arising from the conclusions of the Scrutiny Protocol review.

## **8. Project Approvals**

The Combined Authority discussed two reports, one on Cross-Cutting Project Approvals and another on Transport Project Approvals, for consideration.

### **(a) Cross-Cutting Project Approvals**

The Combined Authority considered a report of the Director of Strategy, Communications and Intelligence setting out a scheme of £15m capacity funding for local councils to provide continued support to new and existing teams to progress economic development work and pipeline development.

**Resolved:**

(a) That:

- i. The Combined Authority approve the change request to the Gainshare Capacity Funding scheme to increase funding by £15,000,000 to 26,400,000, allocated by partner councils as shown below, extend the programme by one year to 31 March 2026, and that work continues on activity 5 (delivery).

- Bradford Council           £3,486,000
- Calderdale Council       £1,318,500
- Kirklees Council           £2,764,500
- Leeds Council             £5,178,000
- Wakefield Council         £2,253,000

- ii. That the Combined approve the total scheme value of £26,400,000, allocated as detailed below.

- Bradford Council           £5,376,000
- Calderdale Council       £3,208,500
- Kirklees Council           £4,654,500
- Leeds Council             £7,068,000
- Wakefield Council         £4,143,000
- Combined Authority       £1,950,000

- iii. That the Combined Authority enters into a contract variation to the existing funding agreements with each of the partner councils for expenditure as detailed in paragraph (ii) above.

- iv. That future approvals are made in accordance with the assurance pathway and approval route outlined in the submitted report and, where required, any change requests are delegated to the Finance, Resources and Corporate Committee subject to the scheme remaining within the tolerances outlined in the report.

**(b) Transport Project Approvals**

The Combined Authority considered a report of the Director of Transport Policy and Delivery on proposals for progression of, and funding for, projects under Investment Priority 5 within the West Yorkshire Investment Strategy (WYIS).

The report detailed the process and outcomes of a review of Kirklees schemes to be funded by the West Yorkshire Plus Transport Fund (WY+TF) and set out recommendations for revised scheme allocations.

Councillor Lamb abstained from the recommendation.

**Resolved:**

That:

- (a) The Combined Authority approve the change request to revise the current Combined Authority funding for the Kirklees projects in the WY+TF, detailed in the table below:

<b>Project &amp; Assurance Stage</b>	<b>Current Approval</b>	<b>Revised Approval</b>	<b>Funding Change</b>
M2D2L (Mirfield to Dewsbury to Leeds) (OBC)	£1,335,000	£1,345,000**	£10,000
A629 Halifax Road Phase 5 (FBC)	£10,546,347	£13,801,870*	£3,255,523
Huddersfield Southern Corridors (excl. Q'gate) (FBC)	£10,315,765	£12,087,660*	£1,771,895
North Kirklees Orbital Route (Pipelined at OBC)	£248,000	£283,409**	£35,409
Holmfirth Town Centre Action Plan (FBC)	£5,173,821	£14,370,426*	£9,196,605
A62 Smart Corridor (In delivery)	£8,350,000	£15,415,496**	£7,065,496
CityConnect Ph3 - Huddersfield town centre (Paused at OBC)	£180,000	£282,333**	£102,333



A629 Fenay Lane (To pause at OBC submission)	£600,000	£750,000**	£150,000
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\* = Revised Indicative approval

\*\* = Revised Full Approval

- (b) The A62 to Cooper Bridge scheme submits a change request to provide details of how the scheme is proposed to be progressed with reduced funding, detailing the change to project scope, costs and delivery, in order to determine a new indicative Combined Authority funding allocation. A revised outline business case then be developed and submitted to the Combined Authority.
- (c) The Kirklees Council contribution to the WY+TF schemes is reduced by £6,547,750 from £13,067,803 to £6,520,053.
- (d) The Combined Authority enters into addendums to the existing funding agreements with Kirklees Council for expenditure up to the revised full approval amounts detailed for the individual schemes in the above table.
- (e) Individual scheme cost tolerances are re-baselined against the updated costs included in the submitted report.
- (f) No further approvals for the funding changes requested will be required through the Assurance Framework and projects will continue on their approval pathways and routes to the next decision point.

## 9. Inclusivity Champion Workplan

The Combined Authority considered a report of the Director of Strategy, Communications and Intelligence and received a presentation from Fatima Khan-Shah, the Combined Authority's Inclusivity Champion, providing detail of recent activity undertaken in support of the workplan.

The Mayor introduced The Inclusivity Champion, Fatima Khan-Shan, to the meeting. Before proceeding to the item, The Mayor explained that she would need to leave the meeting early. As such, she handed over the responsibility of chairing the meeting to The Deputy Mayor, Councillor Lewis. The Deputy Mayor then presided over the remaining business and invited The Inclusivity Champion to proceed with her presentation.

The Inclusivity Champion, Fatima Khan-Shan, opened her remarks with excitement about the opportunity to discuss ongoing activities and build new relationships. She provided context on the role of the Inclusivity Champion

within the West Yorkshire Health and Care Partnership and the Combined Authority, emphasising her aim to address mutual issues through partnership. She highlighted the importance of recognising structural inequalities in all endeavours and maximising impact through connected ways of working.

The Inclusivity Champion discussed the partnership's focus areas, including economic growth, climate emergency response, and tackling structural inequalities. She emphasised the need for a diverse workforce reflective of the community to build trust and improve outcomes and underscored the importance of advocating for social justice and supporting underrepresented groups in decision-making processes.

The Inclusivity Champion outlined five key areas of focus: supporting grassroots organisations, influencing decision-making processes, promoting diversity in the workforce, advocating for social justice, and amplifying voices of seldom-heard communities. She emphasised the need for inclusive leadership and the role of senior leadership in supporting inclusive practices.

The revised work plan aimed to clarify the role of the inclusivity champion and demonstrate the added value of inclusivity initiatives. The Inclusivity Champion highlighted ongoing efforts to engage partners, support existing work programs, and champion inclusive workforce practices, such as the Fair Work charter and the inclusive recruitment toolkit.

In conclusion, the Inclusivity Champion emphasised the importance of demonstrating impacts through ongoing initiatives and fostering collaboration across diverse stakeholders. She invited participation in upcoming events and reiterated the commitment to creating a fairer and more inclusive West Yorkshire.

**Resolved:** That the report and presentation be noted.

## **10. Committee Membership**

The Combined Authority considered a report of the Chief Operating Officer setting out changes to committee nominations and membership.

It was verbally reported that, following publication of the agenda papers for the meeting, Kirklees Council had provided nominations to vacancies on the Transport Committee and Economy Scrutiny Committee which Members were asked to consider.

**Resolved:**

- (i) That deputy chairs be appointed to the Climate, Energy & Environment Committee and Place, Regeneration & Housing Committee in accordance with the nominations set out in paragraph 2.3 of the submitted report.

- (ii) That the Combined Authority note the change to Kirklees Council's nomination to the Culture, Heritage and Sport Committee as set out in paragraph 2.6 above.
- (iii) That the Combined Authority note the termination of Kirklees Council member appointments to the Transport Committee and Economy Scrutiny Committee as set out in paragraph 2.7 above.
- (iv) That Councillor Matthew McLoughlin be appointed as Transport Committee Transport Engagement Lead for Kirklees and that Councillor Yusra Hussain be appointed as a member of the Economy Scrutiny Committee.

## **11. Minutes for Information**

The report had informed members of the Combined Authority about the minutes and notes from recent committee meetings, which were available on the website. Members could access these documents for reference and information.

## **12. Date of the Next Meeting**

It was noted that the next meeting of the Combined Authority was scheduled to be held on Thursday 14 March 2024.

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<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Bus Reform</b>
<b>Director:</b>	Simon Warburton, Executive Director for Transport
<b>Author:</b>	Alex Clarke, Head of Bus Reform

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 The purpose of this report is for the Combined Authority to note and consider the content of the Consultation Response report and associated documents, including the Bus Reform Assessment, and decide whether or not to recommend to the Mayor that she makes a franchising scheme, complying with all associated statutory requirements, or to pursue Enhanced Partnership Plus.
- 1.2 Further to consider and approve the appropriate mobilisation plan depending on the Mayor's decision, including associated funding.

## 2. Information

### Bus Reform Assessment

#### Background

- 2.1 Buses play a vital role in West Yorkshire, getting people to places, connecting our communities, and shaping our economy. They are the most used form of public transport in West Yorkshire, with over 1.7 million bus journeys taken each week (about 6% of all journeys). But evidence shows passengers face many challenges resulting in poor

satisfaction and fewer people choosing to travel by bus, with bus patronage in long-term decline (bus trips fell from 167.7 million in 2011/12 to 92.3 million in 2021/22).

- 2.2 Alongside declining patronage, the bus network is also getting smaller, with the number of miles being operated falling from 60.9 million miles in 2011 to 46.3 million miles in 2021/22<sup>3</sup>. The Combined Authority have also had to contribute more to the running of bus services, rising from £17.1 million in 2018/19 to £21.4 million in 2021/22.
- 2.3 The way that buses are currently run gives the Combined Authority limited ability to change this. Since 1986, most bus services in England have been deregulated, except in London (and Manchester as of September 2023). This means that buses are mainly run by private operators.
- 2.4 In West Yorkshire, there are 26 different bus operators. They have control over their routes, timetables, ticket options, fares, frequency, and service standards. Bus operators receive the revenue from passenger fares. They retain the profits and have the commercial independence to decide how to reinvest this to support the ongoing running of buses. Bus operators own or lease their own vehicles and depots and are responsible for hiring drivers and ensuring bus services run on a day-to-day basis.
- 2.5 The Combined Authority supports local bus services. As the Local Transport Authority (LTA), the Combined Authority supports buses in the region including by:
  - Spending about £21m every year paying for socially necessary services which would otherwise not be provided by bus operators – about 15% of all bus journeys
  - Being responsible for managing the free bus pass scheme for older and disabled people (concessionary fares), as part of the English National Concessionary Travel Scheme
  - Managing most of West Yorkshire's bus stations and maintaining the region's 14,000 stops, shelters and timetable displays
  - Providing up-to-date travel information online and in print for all public transport services
  - Being part of the ticketing company which offers reduced 'MCard' fares and pre-paid tickets for use across buses run by different operators, as well as trains
  - Co-ordinating around ½ million AccessBus journeys per year for 5,000 registered users who are unable to use regular bus services
  - Working with national government to secure new funding for investment in local buses and other projects to encourage more people to travel by bus
- 2.6 Bus operators and the Combined Authority currently work together to try to improve local buses through an Enhanced Partnership (EP). The EP is a statutory partnership between

the Combined Authority as the LTA, West Yorkshire local authorities and all operators running bus services in the region and is approved by all these parties. It is the Combined Authority's current mechanism for working with bus operators to influence and improve the delivery of the local bus system. The EP provides details on the shared plan to improve bus services and provision in West Yorkshire, in line with the ambitions set out in the West Yorkshire Bus Service Improvement Plan (BSIP).

- 2.7 Published in 2021, the BSIP acknowledged challenges facing local buses and set out a vision for a safe and inclusive bus system, better connected communities, decarbonisation, and integrated, sustainable travel. The BSIP also included a plan of interventions to transform the local bus service for the people of West Yorkshire.
- 2.8 The declining patronage and bus network mileage show that the way buses are run now, where private bus operators have primary control over routes, frequencies, fares and standards of our region's buses, is failing to deliver our ambitions for better buses in West Yorkshire and needs to change in order to meet the needs of bus customers and achieve our targets set out in our BSIP.

#### Process to Date

- 2.9 Franchising is a legal model where buses are under the control of a local authority (in West Yorkshire this would be the Combined Authority). A franchising model has been in operation in London since 1984 and was introduced in Greater Manchester in September 2023. Under franchising, the Combined Authority would set the routes, frequency, fares and overall standards of buses in our region. The existing commercially led market would be replaced, with private bus operators no longer being able to run most services independently. Bus services would instead be operated under franchise contracts, where bus operators would bid to run the services through a competitive procurement process managed by the Combined Authority.
- 2.10 The legal process required to transition to franchising from a deregulated, commercial market is set out in the Transport Services Act 2000, as amended by the Bus Services Act 2017 (the 'Act'). The final decision on whether to introduce franchising is a power that sits with the Mayor
- 2.11 A Notice of Intent to conduct an assessment of a Franchising scheme was issued by the Combined Authority in June 2021 in accordance with 123C of the Act, which sets out the statutory process authorities must follow. Furthermore, an internal Bus Reform programme was established to manage this process following indicative approval of an £7m budget by the Finance, Resources and Corporate Committee in January 2022. The programme has since completed an assessment in line with 123B of the Act.
- 2.12 In [May 2023](#), following a report and the provision of a draft version of the Assessment, the Combined Authority noted the Assessment's draft conclusions and recommendation including that:

- According to the assessment across all options including the reference case, the public sector will be increasingly relied on to support the bus sector over time – Franchising is identified as providing the greatest levels of control and direct influence to manage these risks.
  - The assessment concluded ‘that Franchising is the preferred option for the Combined Authority to progress with subject to both the audit and the outcome of the statutory consultation, which will inform a report and recommendation to the Mayor’.
- 2.13 The Combined Authority then engaged with an Independent Auditor, Grant Thornton, who was instructed to prepare a report in accordance with section 123D of the Act. Following further updates to the draft Assessment – including engagement with bus operators on the ‘Enhanced Partnership Plus’ and in response to clarifications from the Auditor – the auditor’s report was finalised in respect of the final Assessment in line with previous delegations.
- 2.14 An Auditor’s Report on the Assessment was therefore produced by Grant Thornton, in accordance with Section 123D of the Act which concluded that, in Grant Thornton’s opinion, in all material respects:
- the information relied on by the Combined Authority in considering the matters referred to in section 123B(3)(d) of the Act (the affordability of the scheme) or section 123B(3)(e) of the Act (the value for money of the proposed scheme) is of sufficient quality
  - the analysis of that information in the Assessment is of sufficient quality
  - The Combined Authority had due regard to the Guidance issued under section 123B of the Act in preparing the Assessment.
- 2.15 In addition to the auditors opinion, the auditors also provided the Combined Authority with a number of observations. Officers reviewed the observations and the impact on the assessment. The response of the Combined Authority to those which were published during the subsequent consultation period. Whilst the observations were welcomed and recognised, the Combined Authority was satisfied that those observations, individually or together, did not contain any grounds to not proceed to consultation.
- 2.16 In [September 2023](#), the Combined Authority then determined, in accordance with the Act:
- to give notice of the proposed bus franchising scheme, and to make copies of the proposed bus franchising scheme, consultation document, Bus Reform Assessment and Audit Report available for inspection.
  - to consult all statutory consultees as listed in section 123E(4) of the Act, and set out in this report, as well as the general public more broadly.



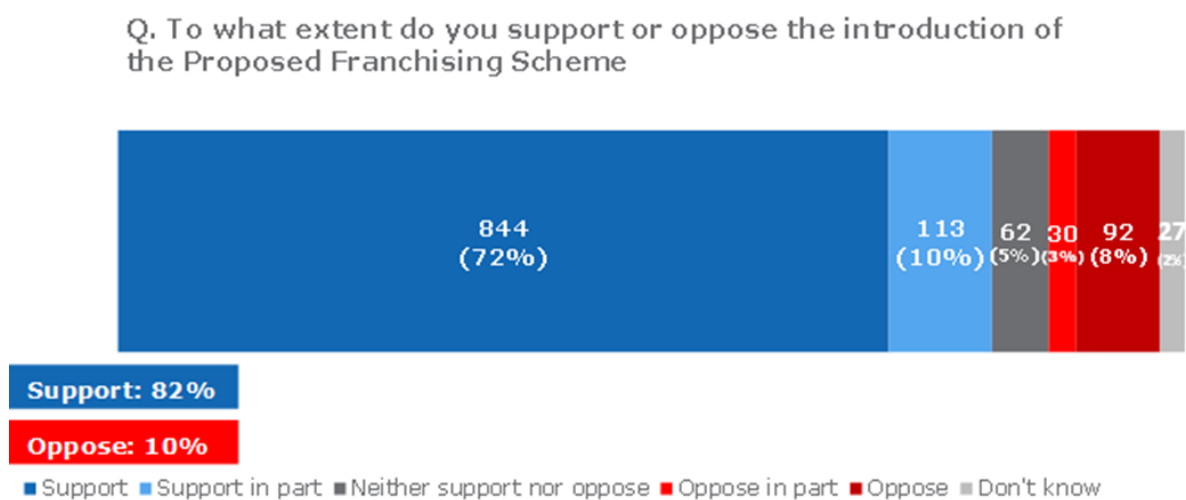
## Consultation Overview

- 2.17 The Bus Reform consultation ran from October 2023 to January 2024. It was promoted as an opportunity to ‘Have your say on how buses are run in West Yorkshire’.
- 2.18 The Combined Authority identified a number of organisations it had to consult with in line with section 123E(4) of the Act. This included all local bus operators; regional district councils; neighbouring transport authorities; Trade Unions (RMT, Unite, Unison); the Traffic Commissioner; the Chief of Police for West Yorkshire; the Competition and Markets Authority; Transport Focus; Bus Users UK; and other local bus users groups – including Action for Yorkshire Transport, Better Buses for West Yorkshire, Campaign for Better Transport and Friends of DalesBus.
- 2.19 Furthermore, the Combined Authority sought to consult widely with the general public, including regular, infrequent and non-bus users. It did this via
- Publication of an online consultation brochure, with corresponding long and short questionnaires (paper copies available at request)
  - 23 awareness raising ‘flyering’ events at bus stations across the region.
  - 11 awareness raising ‘flyering’ events at non-transport locations.
  - 15 targeted ‘drop-in’ and discussion events for local community, bus users and seldom heard groups.
  - 10 Q&A ‘presentation’ events.
  - 2 online webinars
  - 5 independently facilitated focus groups with bus passenger groups.
  - PR, media and digital promotional campaigns
- 2.20 The consultation response has been summarised by an external agency, DJS Research, which has been provided as an annexe with Appendix 2 to this report.
- 2.21 69 stakeholder organisations and a total of 1,176 members of the public participated in the consultation via either the short or long questionnaire or other freeform responses (letters, reports etc). A demographic breakdown of public respondents is provided within the report. Furthermore, the Combined Authority also received 2778 campaign responses (via email and postcard) and a petition with 12,182 signatures.
- 2.22 All participants responding to both the short and long versions of the questionnaire were asked to what extent they supported or opposed the Proposed Franchising Scheme as

set out in the Consultation Document. A total of 1,167 participants provided a response to this question.

- 2.23 As set out in Figure 1, overall, nearly three-quarters (844) supported the introduction of the Proposed Franchising Scheme. A further one in ten participants (113) supported it ‘in part’, whilst 62 participants took a neutral position and neither supported nor opposed its introduction. Around one in ten participants (121) opposed the introduction of the Proposed Franchising Scheme. Of those, the majority (91) opposed it whilst only 30 opposed it ‘in part’.
- 2.24 Responses from organisations tended to be more muted towards the introduction of the Proposed Franchising Scheme compared to members of the public. Of the 44 organisations which responded to this question (i.e. via one of the questionnaires), two-thirds (29) supported it whereas one in five organisations (9) opposed it (compared to only one in ten – 112 – members of the public).

**Table 1: Support/opposition to the Proposed Franchising Scheme**



- 2.25 Responses to other questions, as well as the freeform responses, presentation events and focus groups, provided more qualitative, detailed feedback for the Combined Authority to consider.

Key themes emerging from consultation and the Combined Authority’s response

- 2.26 The Combined Authority has analysed all consultation feedback and provided its own response to this. This Consultation Response is provided in full as Appendix 2 to this report.
- 2.27 Recognising the range of sentiments and views expressed in consultation feedback, the following section sets out the substantive themes emerging from the Combined

Authority's analysis of this and the conclusions made on each of these themes that then informs the Combined Authority's response.

### **Strategic Case**

- 2.28 As explored in Section 4 of the Consultation Response, the main themes identified across the responses relating to the Strategic Case include:

#### Challenges facing the bus industry and evidence for reform

- 2.29 Several operator and passenger groups as well as incumbent operators emphasised external influences and national issues which had impacted bus performance, some of which they felt had not received enough focus on within the Strategic Case. Issues raised included the Covid-19 pandemic, increasing car ownership, and long-term bus patronage decline all of which were claimed to negatively impact bus operators and their customer offer.
- 2.30 From a passenger perspective, respondents focussed on the decline in the bus offer and how privatisation has negatively impacted upon passengers. Many supported the Combined Authority's Strategic Case which recognised the variety of causes which had led to a worse offering for customers, whilst acknowledging the importance of the bus to connect people to social and economic opportunities.

#### Consideration of the objectives presented

- 2.31 A number of responses received from the consultation discussed the objectives presented in the Strategic Case. There was broad support from respondents that the objectives aligned with their ambitions for the bus system in West Yorkshire including common goals around supporting passengers to make journeys to economic and educational opportunities.
- 2.32 Some respondents challenged the objectives with focus around the need for quantified time-bound targets, including a target for patronage growth, and doubts as to whether the Proposed Franchising Scheme would be able to achieve the objectives. In addition, a specific challenge was received that questioned whether the Proposed Franchising Scheme could achieve transport policy targets.

#### Consideration of the options presented

- 2.33 A number of consultee responses expressed a view on the options presented. Several incumbent operators highlighted the success of the current existing partnership in areas around electric buses, fleet investment, and Mayor's Fares. Respondents also considered the Enhanced Partnership Plus option and its ability to deliver similar objectives more quickly and with less financial risk. There were also several respondents, including some operators, that supported the Proposed Franchising

scheme to better deliver against the objectives, particularly those around a cohesive network and local decision making.

#### Tackling issues with bus priority and highways management

- 2.34 Many respondents highlighted issues around bus priority and highways management. A number of incumbent operators argued that highways management directly impacts the performance and efficiency of services and without infrastructure improvements only limited improvements to bus services can be made. Responses focussed on congestion and journey times and the importance this plays for bus customers.
- 2.35 Additional points were raised on the need for consistency across bus priority and Local Authority policy so that customers could experience a consistent service across West Yorkshire.

#### Approach to customer service information

- 2.36 Several responses centred around customer service and information. There were particular points raised relating to the quality of existing provision and a discussion of the best bus reform option to see improvement.
- 2.37 A common theme across respondents was that the current offer must be improved. The Strategic Case concludes that customer service and information is one of the delivery areas most positively impacted by bus reform options. In particular within the bus reform options, the Proposed Franchising Scheme allows for further simplification of the customer offer with simplicity and ease not found in the EP+ proposals due to the ability to implement a single channel for communications and complaints.

#### Environmental Sustainability

- 2.38 A variety of responses concerning the viability of zero emission buses, modal shift and delivery across the different options were received. There was general support for the delivery of the Combined Authority's environmental ambitions. A particular area of focus was around fleet and the delivery of the Combined Authority's ability to deliver zero emission buses under the Proposed Franchising Scheme when compared to the Enhanced Partnership plus option.

#### Fares and Ticketing

- 2.39 A range of comments were made on the theme of fares and ticketing. There was broad support from respondents on the ambitions set out in the Strategic Case on fares and ticketing especially around fare simplification. Responses highlighted the need for a consistent customer product and that overly complicated fares were a barrier for bus users. Many operators expressed a view of the current common ticketing approach and the impact of the Mayor's Fares scheme.

### Network

- 2.40 Several responses were received around the network and, in particular, on the network as described under the Proposed Franchising Scheme. With some respondents suggesting potential network improvements in order to better serve bus users, including requests to support orbital services that avoid city centres, integration with other modes of transport, more night buses, and the role of park and ride.
- 2.41 Responses also focussed on the ability of the different options to deliver network improvements and there were concerns raised on the ability of the Enhanced Partnership plus option to deliver such improvements.
- 2.42 There was a broad range of positive comments supporting the opportunities for the network that the Proposed Franchising Scheme could bring due to the certainty and control it would offer the Combined Authority regarding network decisions.

### Strategic Case Conclusion

- 2.43 As explored in Section 4.11 of the Consultation Response, the conclusion on the Strategic Case highlights that there are queries, concerns and support for the Strategic Case for bus reform, including the current challenges, objectives and options set out. Greater detail is included in sections 4.2 – 4.9 of the Consultation Response Report in response to the specific comments raised.
- 2.44 When considering the responses to the consultation, both in terms of support for and challenges to the Strategic Case the Combined Authority believe the evidence presented in the Strategic Case responds to the challenges facing the bus industry, which is reflected in the formation of objectives.
- 2.45 There was broad support in the consultation responses concerning the need for reform as well as the assessment of how likely the different options for reform would be in meeting the Combined Authority's objectives for bus. Particular challenges were made in the consultation responses regarding bus priority, fares and ticketing, as well as customer service and information.
- 2.46 Considering the challenges raised in consultation responses, the Combined Authority is satisfied that the Strategic Case addresses the themes appropriately and that the objectives for the bus system and that the Proposed Franchising Scheme represents a better opportunity to achieve the Combined Authority's ambitions for the bus network than the EP+ reaffirming the conclusions of the Strategic Case of the Assessment

### **Economic Case**

- 2.47 As explored in Section 5 of the Consultation Response, the main themes identified across the responses relating to the Economic Case include:

### Assumptions used in the Economic Case

- 2.48 In order to prepare the Economic Case for bus reform a number of assumptions had to be made. The main areas of concern raised by respondents were around:
- The assumption that in the Reference Case, patronage would only recover to 80% of its pre-Covid level
  - The continued decline in bus patronage
  - The use of a 40-year period over which to assess the options (the appraisal period)
  - The comparatively modest improvements to service frequencies and new routes proposed as part of the EP+ and Franchising options.

### Margins used in the Economic Case

- 2.49 A number of operator responses stated that the Economic Case was overoptimistic about the margins achieved by operators on current services, or that the Combined Authority had incorrectly calculated the margins used in the assessment. There were also comments sceptical about the opportunity to fund more bus services under Franchising because margins were assumed to be lower on franchised services.

### Risk in the Economic Case

- 2.50 Responses raised a number of different possible risks that were identified and comments made concerning them, some of which were also raised in relation to other cases in the Assessment. These included:
- The transfer of revenue risk from operators to the Combined Authority under Franchising and the comment that therefore the EP+ is lower risk for the Combined Authority
  - The benefits operators experience through risk transfer
  - The risks associated with the acquisition of depots and fleet under the Proposed Franchising Scheme
  - The risk associated with the delivery of services which is partly transferred to the Combined Authority from operators under Franchising
  - The linked political and reputational risk to the Combined Authority under Franchising

#### Fares and ticketing simplification benefits

- 2.51 A number of respondents were concerned about the magnitude of the benefits of fares and ticketing improvements assumed under the EP+ option and the Proposed Franchising Scheme. Some comments were made in suggestion that benefits were already achieved in the reference case because of existing interventions that have been achieved.

#### Missing benefits

- 2.52 Some respondents suggested there might be other additional benefits particularly associated with the Franchising option such as better integration of the bus system and public confidence. Some comments also suggested there could be wider economic benefits from possible increased ridership on a franchised network.

#### Other impacts on operators, passengers and the Combined Authority

- 2.53 A number of other impacts on operators, passengers and the Combined Authority were mentioned by respondents. Operators were obviously concerned about the impacts of the Franchising option on them and there was particular concern about the impacts on SMOs, though it was also acknowledged that the franchising process has some potential advantages which may suit SMOs. These issues are considered in the Commercial Case. Many of the impacts of the proposed Franchising option on passengers were felt to be beneficial by consultation respondents.

#### Other comments

- 2.54 A wide range of other comments were made, ranging from concerns about how long it would take to implement the Franchising option (compared to the quicker benefits available under the EP+ option) to the continued likely piecemeal support for non-commercial services under the Reference Case and the incentives operators have to improve services under the EP+ option.

#### Economic Case Conclusion

- 2.55 A wide variety of different comments and concerns were raised in connection with the Economic Case of the Assessment, and greater detail is included in sections 5.2 to 5.8 of the Consultation Response Report in response to the specific comments raised. These were considered carefully under a number of different themes and some areas of uncertainty were investigated using additional sensitivity tests. After careful consideration, none of the responses to the Consultation raise issues which materially alter the findings of the Economic Case.
- 2.56 Some of the issues particularly raised in the consultation response by First West Yorkshire, but also by other bus operators, were considered in greater technical detail and the results are discussed in Appendix 5 of the Consultation Response Report.

- 2.57 The Combined Authority are confident that the findings of the Economic Case remain robust. Both bus reform options represent 'very high' VfM because they are forecast to generate benefits considerably higher than the costs required to implement them. The advantages of Franchising include the greater control the Combined Authority would have over the bus network under this option. However, both options are justified interventions and the decision between the two options should be based upon wider considerations set out in the other Cases of the Assessment.

### **Commercial Case**

- 2.58 As explored in Section 6 of the Consultation Response, the main themes identified across responses relating to the Commercial Case include:

#### Evaluation of the Commercial Success Factors

- 2.59 This theme sought to understand comments made in response to the Commercial Success Factors (CSFs) set out in the Assessment. There was general agreement that the CSFs were correct, but some concerns about how they were treated across bus reform options. There were differing views on which option presented best value with various conclusions reached. The 'Competition' success factor was the subject of comments about the change in competition that would occur if the Proposed Franchising Scheme was made with responses considering challenges to SMOs, the size of the market and the ability to innovate. Several comments on 'Transport Authority Influence' suggested that greater influence does not necessarily lead to better outcomes, whilst some raised that it naturally biased the CSF in favour of the Proposed Franchising Scheme. The scale of change and the requirements needed to introduce the Proposed Franchising Scheme were the main comments on the 'Ease of Implementation' CSF.

#### Franchise contracts, procurement, and implementation and transition planning

- 2.60 There were a variety of responses on contracts, with helpful comments received in terms of contract length and additional contract specifications. Generally there was support of proposed contract mechanisms including contract length with responses demonstrating the link between contract length and performance and innovation. Several points were made in addition asking for specific interventions to lengthen contracts or add in additional contract extensions. Specific questions and suggestions were received on a number of contract mechanism including the performance regime, change mechanism, contract content and resource and contract failure.

#### Consideration of cross-boundary services and the service permit regime

- 2.61 Responses received in this theme focused largely on service permits and the scope of the network. Other considerations were given on the list of services which is discussed in the Proposed Franchising Scheme sections 3.4 and 3.5.



- 2.62 Responses on service permits generally noted that it was unclear on how permits would be managed alongside franchising contracts and made comments on the phasing and standards applied to them. Several comments were received expressing concern for the continuation of cross-boundary services and the potential impact on these services of a permit regime. Questions were raised regarding cross-boundary services and whether they were adequately addressed within the Commercial Case.

#### Approach to assets

- 2.63 Comments made on assets were predominantly on the approach to fleet and the approach to depots. Responses on fleet raised questions regarding bus specification and management of assets. There were also comments relating to procurement of fleet and the impact of vehicle availability on the outcomes of the Proposed Franchising Scheme. Additional comments were received in regards to leasing agreements and residual value mechanisms requesting further clarification on these.
- 2.64 Responses received on depots covered a range of topics, highlighting potential issues with connecting existing depots to EV infrastructure, land availability and location for the development of new depots, the interactions depots have with the lotting strategy and the cost of depots. The ability for the Combined Authority to acquire depots was particularly highlighted by operators as a challenge for the timetable of implementation.

#### Consideration of the impact on SMOs

- 2.65 The majority of responses within this theme raised issues on the risks to SMOs if the Proposed Franchising Scheme is introduced. This includes impacts on a reduced operator community and potential barriers to bidding if contracts are too onerous to bid for. In addition, some SMOs thought the current SMO context including working arrangements and ambition had not been fully considered within the Commercial Case.

#### Lotting Strategy

- 2.66 A variety of comments were received regarding the lotting strategy including several that welcomed the opportunity of smaller lots which may be more suitable for SMOs. Some comments were made that highlighted the need for the Lotting Strategy to be structured in a way that did not bias incumbent operators and the need to review the approach through the lotting rounds. Some specific comments were made regarding the safeguarding of smaller lots and the impact on SMOs. Within the Consultation Response Report further comments were considered on lotting within the Proposed Franchising Scheme section 3.3 of that report.

#### Risk Allocation

- 2.67 A variety of risks were identified through responses, largely reflecting issues discussed elsewhere in this section or reflective of comments in other cases of the Assessment. Responses noted that risk to the Combined Authority would increase and questioned

whether this would provide the best outcomes for bus customers. The changes to revenue risk were also raised alongside risks with timetabling and the loss of expertise, again relating back to the responsibility of risks changing between bus reform options. Risks to the CSFs were also discussed in some responses. Risks to operators were also identified, including risk to operation of services during transition and risk of losing operator knowledge.

#### Commercial Case conclusion

- 2.68 The conclusion on the Commercial Case highlights that there are queries, concerns and risks perceived in the assessment of the commercial propositions for the bus reform options, but also that there is support for elements of the proposed approach of the Combined Authority. Greater detail is included in sections 6.2 to 6.9 of the Consultation Response Report in response to the specific comments raised.
- 2.69 The Combined Authority maintain that the purpose of the Commercial Case is to consider whether options present a commercially viable delivery approach to the bus reform option. The scale of the change, particularly in delivery of the Proposed Franchising Scheme is recognised across the Assessment and is reflected in the Commercial Case, which outlines a range of the approaches the Combined Authority would look to take on contracts, assets, implementation and employment considerations that are all intended to drive a competitive market for franchised contracts,
- 2.70 Whilst the Combined Authority remains confident following the consultation feedback that from a commercial perspective, either bus reform option is deliverable, it maintains the view that the CSFs can be better met with the Proposed Franchising Scheme due to the control and certainty it provides over outcomes across the bus network. However, specific comments provided in relation to the details of contracting, the approach to asset acquisition, the approach to cross boundary services, to facilitating SMO participation and the final allocation of routes through the lotting strategy will be taken on board in refining these approaches should a decision be taken to introduce the proposed franchising scheme. The Combined Authority recognises that further market engagement on all of these matters would also be essential to mitigating risks during implementation.

#### **Financial Case**

- 2.71 As explored in Section 7 of the Consultation Response, the main themes identified across responses relating to the Financial Case include:

#### Assessment assumptions and modelling

- 2.72 A number of consultees raised comments on the assessment assumptions and the modelling work in relation to the financial case. The assumption that passenger numbers would continue to decline reflecting long term trends under all options was especially highlighted.

- 2.73 Other comments in this section focussed on particular assumptions and modelling work, including on margins, indexation and dealing with a pandemic type event. There was also a clarification on figure 9 of the Consultation Document which had some missing labels, although from comments from a number of other stakeholders it does not appear that these missing labels caused a barrier to responses.

#### Funding and finance sources

- 2.74 Consultees raised comments about the funding and finance sources available to the Combined Authority to fund buses, with some comments more general to the availability of sufficient funding, whilst others were focussed on individual sources of funding. In summary terms, most comments were concerned with whether sufficient funding sources would be available to the Combined Authority. Specific sources that were queried included: Transport Levy, Single Investment Fund, Bus Service Operator Grant, ZEBRA (Zero Emission Bus Regional Areas) and funding in relation to the cancellation of HS2. Some comments discussed alternative funding sources that could also be drawn upon.

#### Costs of implementing franchising

- 2.75 The theme of the costs of implementing franchising brought up points that the franchising case contained higher costs than the alternatives, with some focus particularly given to the transition costs, the capital costs, and the ongoing management costs of the scheme.
- 2.76 In criticism of those costs, points were made about the costs being high, not asked for by the public, not delivering services and being avoidable under EP+.

#### Cost of implementing the EP Reference Case or the EP+

- 2.77 A number of comments were also received on the costs of implementing an Enhanced Partnership model, with some comments specific to the Enhanced Partnership Plus alternative option in the assessment, with others more general to costs of Enhanced Partnership schemes.
- 2.78 Some comments focussed on the need for long term funding under an Enhanced Partnership. There were comments that the Enhanced Partnership Plus model would be affordable, with some stating that it was at less cost to the Combined Authority with comparable benefits, whereas others stated that it was less cost but didn't match their ambitions. There were also some specific elements of the costs assumed for the Enhanced Partnership Plus model, and on the suggestion from one operator of a profit share mechanism.

#### Financial and cost risks to the Combined Authority

- 2.79 The issue of risk was a common theme, with increased financial risk for the Combined Authority of increased borrowing and revenue risks highlighted particularly. In some cases, there were comments suggesting the risks are justified for the benefits, but there

were also opposing views that they were not justified, and issues of concern about the level of risk, and also that some risks had not been considered.

- 2.80 A number of consultees accept that the Combined Authority would be taking on additional financial risk, but that these would be justified if the benefits outlined can be realised.

#### Financial cost / risk to local authorities

- 2.81 Similarly to the section on financial and cost risks to the Combined Authority, some comments also considered the impact on local authorities. The main focus of comments was on the possibility for increased charges to taxpayers and the current financial austerity of local authorities, with points raised by local authorities themselves but also from several bus operators.

#### Financial Benefits of franchising

- 2.82 There was a theme of comments suggesting that there would be financial benefits of franchising, and in some cases suggested that benefits have been understated in the assessment, such as by reinvesting in the network, increased stability or retaining profit not going to private profit.

#### Value for Money / use of public money

- 2.83 A final set of comments, that closely link to the economic case, focussed on the issue of value for money, with comments suggesting that the financial case does not demonstrate good use of public money.

#### Financial Case conclusion

- 2.84 The Consultation Response's conclusion on the Financial Case highlights that there are concerns among stakeholders about the overall costs of delivering the Proposed Franchising Scheme and the financial risks that are associated with delivery. Greater detail is included in sections 7.2 to 7.9 of the Consultation Response Report in response to the specific comments raised.
- 2.85 It is recognised that a number of consultees raised concerns over future sources of funding and finance, with there being a level of uncertainty with regards to funding sources identified in the Financial Case. Whilst the Combined Authority has considered that this uncertainty does exist, they are still believed to be a valid assumption on which to compare the regulatory options, and in most cases the impact of those funding sources reducing or not being available in the future would impact equally across all reform options. Long term funding certainty, and further investment from Government in bus services, are developments that the Combined Authority would wish to see happen under either reform option to support the delivery of services in the future.
- 2.86 As highlighted in the Assessment's financial case conclusions, the Combined Authority would carry more financial risks, both in terms of carrying cost and revenue risks and

more asset risk. These concerns are recognised, however, consideration of these points has not altered the Combined Authority's view that the scheme remains affordable within the budget available and under different scenarios as assessed, with the Combined Authority having means by which future funding requirements can be managed. Furthermore, as highlighted in the summary of public responses in the DJS report, the risks are recognised as being necessary to deliver the benefits of bus reform, with the assessment suggesting franchising is forecast to provide greater passenger journeys than the alternative options.

### **Management Case**

- 2.87 As explored in Section 8 of the Consultation Response, the main themes identified across responses relating to the Management Case include:

#### Organisational ability to manage.

- 2.88 There were a range of comments provided that spoke either positively, negatively or with mixed opinions on the Combined Authority's overall ability, with additional resource and competencies, to manage the Proposed Franchising Scheme within its existing organisational structure. This was further divided into subthemes including 'general comments', 'resource requirements', 'competencies, roles and responsibilities', 'skills and training', 'organisation / team structures', 'duplication of effort', 'transition', 'process and decision making', and 'IT and system requirements'.

#### Recruitment

- 2.89 There were a range of comments that acknowledge different aspect of the recruitment of the required resource, including Combined Authority staff, the transfer-in of bus operator staff to the Combined Authority and the recruitment of bus drivers and other operator staff.

#### Management costs

- 2.90 A number of responses raised specific queries about costs associated with the management of the Proposed Franchising Scheme, as well as the EP+.

#### Managing risk

- 2.91 This theme reflects comments raised regarding the risks involved in managing the bus reform options, particularly the Proposed Franchising Scheme, as well as the Combined Authority's approach to managing risks, and how thoroughly risk had been considered within the Assessment more generally.

#### Role of district councils and partnership working

- 2.92 A range of comments were received about the role of district councils under the Proposed Franchising Scheme, wider partnership working and specifically about highways management and the adoption of Key Route Network (KRN).

#### Future organisational change

- 2.93 This theme reflected queries around how the Combined Authority has considered future organisational change, such as delivery of the Mass Transit programme, within its management proposals.

#### Consultation and engagement requirements

- 2.94 This theme reflects that many comments were raised about the need for the Combined Authority to conduct consultation and engagement with stakeholders and the general public throughout implementation and 'steady-state' operation of the Proposed Franchising Schemes.

#### The EP+ and alternative management arrangements

- 2.95 This theme encompassed the range of comments made about management proposals relating to the EP+ - including general positive and negative comments as well as queries about specific resource requirements identified. Furthermore, the theme considered the legal provisions for exiting a franchising scheme, should that be required in the future.

#### Employment

- 2.96 This key theme reflects comments emerging from consultation across the management and commercial case regarding employment. It acknowledges potential impacts on the employment of both Combined Authority and bus operator staff, includes a recognition of both employment opportunities and challenges presented by the Proposed Franchising Scheme, and encompasses five distinct but connected sub-themes, 'TUPE and staff transfer', 'staff wages and pay', 'terms and conditions', 'pensions', and 'trade unions and collective bargaining'.

#### Management Case conclusion

- 2.97 The conclusion on the Management Case response highlights that there are queries and concerns among stakeholders about management proposals associated with delivering the Proposed Franchising Scheme and the risks that come with this. Greater detail is included in sections 8.2 to 8.9 of the Consultation Response with regards to the specific comments raised.
- 2.98 Following consideration of all the comments raised, the Combined Authority remains of the view that, with additional competencies and resources, it can manage the Proposed

Franchising Scheme through its existing organisational structures – including management of associated risks. Nevertheless, the Combined Authority acknowledges that, as set out in the Assessment, it will need to develop a detailed resourcing plan. Furthermore, it will need to carefully manage the implementation of this as a priority to ensure it is able to recruit the additional resources, with appropriate skills and experiences, throughout transition ready for steady state.

- 2.99 It will also need to set out a more detailed plan for the application of TUPE will need to be developed in due course, including a communication and engagement strategy with employers and employees throughout the procurement and mobilisation of franchised contracts. It also acknowledges that its consultation and engagement proposals as set out in the Assessment, need to be developed in more detail at an appropriate time in the development and delivery of the scheme.
- 2.100 Recognising the comments and advice shared by consultees, the Combined Authority believes itself best placed to understand its own resourcing requirements to manage the issues identified. Nevertheless, as with the delivery of any service or project, the Combined Authority will keep resourcing requirements under review. Should it at any point determine that additional resource could offer further benefits to the delivery or operation of the Proposed Franchising Scheme it will consider this, including by assessing any impact on the assumptions underpinning the Management Case. The Combined Authority would also follow its usual corporate processes to consider how to meet that requirement, including determining funding sources, roles and responsibilities and benefits against business objectives).
- 2.101 Furthermore, it will remain open to exploring alternative operating models in the future to create efficiencies as and when other major transport projects, such as Mass Transit, develop to a point of greater certainty but the Combined Authority is confident that its existing structures provide a mechanism to deliver the scheme.

### **Assessment summary and conclusion**

- 2.102 As explored in Section 8 of the Consultation Response, the main themes identified across responses relating to the Assessment Summary and Conclusion, that could not be related to themes under individual cases, include:

#### Support and other comments on the preferred option

- 2.103 This theme acknowledges comments made specifically supporting the conclusion of the Assessment, as well as a wide range of additional comments on Franchising and Enhanced Partnership+. Therefore, this theme encompasses comments that can be sorted into the following categories; 'Benefits of Franchising'; 'Negatives of Franchising'; 'Neutral on the preferred option'; 'Alternative options'; 'Benefits of EP+'; and 'Negatives of EP+'.

#### Support and other comments on the process

2.104 This theme acknowledges comments made supporting the process undertaken by the Combined Authority in conducting the Assessment and seeking stakeholder views via the consultation.

Operators support for the West Yorkshire bus market

2.105 This theme acknowledges comments made by bus operators in support of buses in West Yorkshire.

Putting passengers first

2.106 This theme acknowledges comments made about put the needs of local bus customers first in consideration of bus reform.

Impacts on SMOs

2.107 As emerged under other case, including the Commercial Case, this theme acknowledges concluding comments made about the impact of bus reform on small and medium sized bus operators and their position in the market. It also addresses requests for guarantees or compensation for operators should the Proposed Franchising Scheme be implemented.

Comments on political / Mayoral ambitions

2.108 This theme acknowledges comments made by some stakeholders suggesting politics has had a negative influence on the bus reform assessment.

Commitments to work with the Combined Authority

2.109 This theme acknowledges comments made by stakeholders providing their commitment to work with the Combined Authority to deliver bus reform.

Further work to be done

2.110 This theme acknowledges comments made about there needing to be further work beyond the bus reform assessment to both successfully implement the preferred option and achieve wide transport aims and objectives.

Conclusion

2.111 Concluding on these final themes, the Consultation Response summarises that it is clear there is difference of opinion across stakeholders, with some in support and other against the implementation of the Proposed Franchising Scheme, and that within these views there are important, specific points for consideration.



- 2.112 The Combined Authority has followed the statutory process set by the Act to assess the options for bus reform, and provided opportunity for participation in the consultation both by statutory consultees, and other stakeholders and the general public.
- 2.113 The Combined Authority recognises, as expressed by many consultees, that it will need to continue working closely with stakeholders, in particular bus operators, to successfully implement the Proposed Franchising Scheme – and thanks respondees who have offered their commitment to doing so.
- 2.114 It also shares the view that the interest of local bus customers need to be put at the forefront of the assessment of bus reform, which is why it embedded these in the objectives of the Assessment and the approach to consultation. The Combined Authority also stands by the value of democratically elected politicians’ open and transparent involvement in delivery of the local bus system – including the decision on whether to implement the Proposed Franchising Scheme.
- 2.115 Finally, the Combined Authority acknowledges further detailed work needs to be done in order to successfully implement the scheme, and realise its full ambitions for buses in West Yorkshire.

### **Changes to the Proposed Franchising Scheme**

- 2.116 The Proposed Franchising Scheme is the legal scheme which it was proposed would be made in accordance with the Act in order to implement franchising in West Yorkshire, and which was reflected in the Assessment. A draft was published as part of the consultation material.
- 2.117 The Consultation Response concludes that the Proposed Franchising Scheme should apply to West Yorkshire as a whole fitting best with strategic objectives that recognise the importance of a sustainable transport offer across West Yorkshire.
- 2.118 Furthermore, with regards to the Lotting Strategy, the Combined Authority remains comfortable with the proposed split of the geographical area with the approach to procuring franchised contracts, and the proposed three rounds of procurement, all of which had a broad level of support across consultees.
- 2.119 Comments on the proposed decision date are effectively dealt with by this paper being taken forward at this time, noting that there were a range of views on how quickly a decision should be taken.
- 2.120 Having considered a range of consultee views, it is not proposed to change either the minimum length of the mobilisation period or the list of service exemptions. However, the Consultation Response does set out reasoning behind why many of the exemptions requested would not be required, and in particular why the use of a permit scheme (as proposed in the Assessment) would enable many of the services which were requested by consultees to be exempted to operate (or continue to operate) in the area after franchising, provided that they provide passenger benefits and do not adversely affect franchised services.

- 2.121 However, as a result of the consultation, changes have been made to the Proposed Franchising Scheme in relation to:
- Services to be franchised.
  - The date of commencing operations of services to align with school term dates.
- 2.122 Two list of services to be franchised were included as Annex 1 and 2 to the Proposed Franchising Scheme. These have been updated to reflect that the network has evolved since the initial assessment period in 2021. Whilst many services remain the same, others have been amended to reflect the changes to the bus connectivity in West Yorkshire, during the post-pandemic period.
- 2.123 This list, therefore differs from the 2021 list to reflect where bus services have changed their route, including the Start, Via or End points, due to various operational factors in relation to running bus services. This is consistent with the note included in Annex 1 to the Proposed Franchising Scheme published with the consultation documentation that noted that the lists may need to be updated to reflect change in the bus network in the interim. The scheme that it is proposed would be made has therefore been updated so that any service that operates as of February 2024 which meets the following criteria has been included;
- The service operates solely within the West Yorkshire boundary; and
  - The service is considered open to the general public;
- 2.124 Services running within the boundary, which for any portion travel outside of West Yorkshire, and services which cannot be considered open to the general public (such as closed school services), have not been included within this list as they will be controlled through other means, namely service permits for cross boundary routes and Scholars' Services for closed school services. Therefore, whilst changes have been made to the scheme those changes are consistent with the approach set out in the assessment and the Proposed Franchising Scheme that went to consultation.
- 2.125 Feedback from consultees noted the benefits of having contracts commence so that they were aligned to school terms, in particular where they included schools contracts. The first date that services can commence under contracts is now specified as 28 March 2027, which would fall in school holidays, and the Combined Authority intends to let future contracts so that services equally commence so that they are aligned with school terms. This does not require further amendments to the Proposed Franchising Scheme, as only the first contract date is specified in the scheme.

#### **Impact on small-to-medium sized bus operators**

- 2.126 Consideration of the impact on small-to-medium-sized operators is a legal requirement of the Combined Authority under the process set out by the Act, and further to the strong

feedback received, it has also emerged as a crossing-cutting theme with the Consultation Response, see paragraph 2.65. The Combined Authority has considered this seriously and a position paper setting out its response on this specific matter has been included as Appendix 5 to this report.

### **Final recommendation to the Mayor**

- 2.127 The Assessment's original conclusion set out that following analysis of each option across all five cases, Franchising offers clear strategic benefits and greater opportunity to achieve the Combined Authority's objectives and ambitions for West Yorkshire compared to the reference case and Enhanced Partnership 'Plus'.
- 2.128 However, the Assessment made clear that Franchising requires significant capital investment by the Combined Authority and has additional key risks including:
- Budget risk and responsibility for farebox revenue.
  - Management of market transition and procurement of services.
  - Fleet purchase and depot acquisition.
  - New skills and resources required for delivery.
- 2.129 The Assessment demonstrated that an Enhanced Partnership 'Plus' model also offers increased benefits beyond the reference case. This would have less risk for the Combined Authority compared to Franchising but is ultimately still dependent on being able to agree its delivery with local bus operators – reducing the level of certainty and control for the Combined Authority. Letters of commitment received alongside operator proposals provide confidence in support of interventions from those operators, however further work would be required with them to agree the detailed specifics of what could be achieved under this model for the benefit of local passengers, and there remains a risk that not all of the benefits assumed would actually be delivered and maintained.
- 2.130 The assessment showed that both franchising and Enhanced Partnership 'Plus' are justifiable options in terms of delivering High Value for Money, are affordable and deliverable. However, modelling outputs show that across all options, the challenge of ongoing bus patronage decline remains and would require service cuts unless further investment and / or additional policy levers are applied to significantly increase passenger demand and / or cover the cost of maintaining current service levels. Both Franchising and the Enhanced Partnership Plus would slow this rate of decline, with the former doing this to the greatest extent and at better value for public money.
- 2.131 Furthermore, across all options including the reference case, the assessment forecast that the public sector will be increasingly relied on to support the bus sector over time – Franchising is identified as providing the greatest levels of control and direct influence to manage these risks. The assessment therefore concluded that Franchising was the

preferred option for the Combined Authority to progress with, but this was subject to both the audit (that was completed) and the outcome of the consultation report.

- 2.132 The statutory audit report found no material concerns with the final assessment in accordance with the legislation which allowed the Combined Authority to commence the consultation process. The consultation allowed both statutory consultees as well as wider stakeholders and the public to have their say on how buses are run in West Yorkshire and to consider the detail of the bus reform options presented.
- 2.133 Overall, there are clear levels of consultation support for the implementation of the Proposed Franchising Scheme with strong support from the wider public, but also a range of criticisms and concerns raised by statutory consultees and other stakeholders, in particular from bus operators, who the Combined Authority acknowledges may be affected by what amounts to a material change in the regulatory structure of the bus industry in West Yorkshire. The Combined Authority has therefore considered very seriously all feedback raised, including from respondents who stressed the scale of change and risks involved, and this is reflected in the Consultation Response.
- 2.134 In considering consultation feedback, this Consultation Response re-emphasises that Franchising requires significant transition and capital investment by the Combined Authority but that these, as well as ongoing revenue costs, remain affordable within the budget available and under the different scenarios considered by the Assessment, and in response to issues raised by consultees.
- 2.135 The risks highlighted within the Assessment's conclusion remain and these have been reflected in key themes emerging from the consultation feedback. Consultees rightly highlighted the risks inherent in the introduction of franchising, and the need for the Combined Authority to have robust procedures to identify, mitigate and manage those risks. The Consultation Response has therefore considered and responded to comments relating to each of these as well as restating the Combined Authority's overall approach to managing risk both at a programme and corporate level, which would be applied whether the Combined Authority proceeded with franchising or the EP+. Having reviewed these measures and its continued work on risk management, the Combined Authority remains comfortable that its procedure is sufficient to enable it to identify and mitigate the risks involved in implementing the Proposed Franchising Scheme or progressing with EP+.
- 2.136 Having considered consultation feedback carefully, including a range of risks raised by consultees the Consultation Response concludes that the Proposed Franchising Scheme would be deliverable by the Combined Authority, as per the Assessment original conclusion. Comments provided during consultation have been very helpful in strengthening the commercial proposition, either by reaffirming the Assessment's original strategies, influencing changes, or providing useful points for further consideration by the Combined Authority as implementation progresses. Additional points have also been considered with regards the internal competencies and resources required for the Combined Authority to manage the scheme within its existing organisational structure.

- 2.137 It is also clear from the consultation feedback received that the local bus network plays a vital role in West Yorkshire and is strategically important for its future development as well as the day-to-day lives of residents who depend on it to travel to work and education, access other vital services, and to enjoy leisure and cultural opportunities across the region. However, buses in West Yorkshire face many challenges which justify significant action to overcome, including the currently predicted long-term decline in use and shrinking network, which is judged an unacceptable outcome by many. Franchising provides the greatest levels of control and direct influence to respond to this, above and beyond the Enhanced Partnership Plus, and is therefore the preferred option to achieve the change needed.
- 2.138 Nevertheless, the Consultation Response also makes clear the decision to implement the Proposed Franchising Scheme will have implications beyond the Combined Authority. The Combined Authority will need to continue working closely with bus operators, their employees (such as drivers and vehicle maintenance staff), its district council partners, as well as bus users and other community groups to ensure the scheme is successful in delivering its aims and objectives. This will also need to be complimented with other transport policy and infrastructure interventions to maximise the benefits of an integrated, reliable, and attractive bus service.
- 2.139 Based on the content set out throughout, the Consultation Response reaffirms the Assessment's conclusion and recommends to the Mayor that the Combined Authority proceed with the Proposed Franchising Scheme as the preferred option for Bus Reform in West Yorkshire.

### **Mobilisation**

- 2.140 It is recognised that whatever decision is taken on next steps for Bus Reform it will be important that the Combined Authority can move quickly to implement the chosen course of action, building out at pace from the business case of the Assessment which sets out how each option would be implemented. The following section outlines proposed initial activities for both Franchising and EP+.

#### Transition to Franchising

- 2.141 The Combined Authority has developed arrangements to support the transition from the existing deregulated market to a fully operational franchised model. Key elements of this transition plan, as outlined in the Commercial Case and Management Case of the Assessment include:
- Procurement design and procurement – including market engagement and ensuring Operators can mobilise in time to deliver an effective service
  - Market and network management – including service continuity and provision of services during transition

- Systems – ensuring that these are in place and new systems procured as required
- Resourcing and organisational change – putting in place the required staff and processes
- Communications and engagement – setting out a clear communications and engagement plan for transition
- Leadership – ensuring that leadership and governance are in place to manage the transition process

2.142 Following the mayoral decision to implement Franchising, the Franchising scheme would include provisions that revoke the Enhanced Partnership plan and scheme(s) in relation to the areas that the franchising scheme relates. During an implementation period of franchising, the Combined Authority would need to manage the risk that services (both commercial and tendered support services) do not continue at their forecast level. There are several ways to manage the risk of Operators de-registering services before franchising comes into operation including; the publishing of a 'Transitional Notice' at the same time as making and publishing the franchising scheme, which implements a 112 day period to cancel or vary services within the franchising scheme area in the transition period, but retains flexibility for shorter periods at the Combined Authority's discretion. A draft transition notice is included at Appendix 4.

#### Transition to EP+

2.143 Under EP+, Transition is a two-year period which commences with a Combined Authority decision to proceed with the EP+ option. The transitioning in of incremental resource would be necessary to be ready for steady state, but a dedicated Transition team would not be required. Over the period of the two year transition, a new Enhanced Partnership Scheme will be agreed, and key interventions of the programme delivered including: establishment of a network management group, Qualifying Agreements in place on key corridors, developing the single point of contact and unified branding.

#### Mobilisation Programme

2.144 Given the importance of mobilisation to delivering the benefits of either reform option, the Combined Authority has identified work areas in line with the transition requirements to concentrate on and hold workstream groups to identify the workstreams that will come out of these. For Franchising these workstream areas are the transition in relation to;

- Customers (to lead the organisation in transition of the customer service requirements for delivering bus franchising, working smoothly with existing teams to transition from BAU to delivering franchising customer services),
- data (to lead the organisation in transition to establishing a coherent data landscape and processes to handle the data requirements of a franchised bus network),



- network planning & mobilisation (to lead the organisation in transition to a wholly controlled West Yorkshire bus network, ensuring a smooth transition whilst contracts are let),
- contracting (to lead the organisation in transition to establishing a coherent and commercially viable contracting approach to letting franchised contracts for the West Yorkshire network)
- and assets (to lead the organisation in transition through the asset acquisition and mobilisation for delivering bus franchising, setting out longer term approaches to effective ongoing management and policy).

2.145 For EP+ these workstream areas are the transition in relation to;

- network (To lead the organisation into EP+ bus network, ensuring a smooth transition from EP to EP+),
- fares and ticketing (To lead the organisation in transition to a simpler and streamlined ticketing offer, working closely with operators on the design and implementation),
- bus priority (to lead the organisation in delivering bus priority within EP+),
- customers (to lead the organisation for the customer service requirements in EP+, working smoothly with existing teams to transition to delivering EP+ customer services,
- and green buses (To lead the organisation in implementing new activity in relation to zero emission buses as part of the EP+).

2.146 The initial three, six and eighteen month (24 months for EP+) priorities identified for mobilisation for franchising and EP+ is given below:

#### 2.147 3 Month Priorities

- Mobilising initial workstream teams
- Identifying lead roles and responsibilities
- Completing detailed programming
- Prioritising external recruitment and procurement as required
- Evolving governance arrangements for transition

#### 2.148 6 Month Priorities

- Completing priority recruitment activities as required
- Completing finalisation of central strategies – e.g. lotting, depot, fleet
- Commencing key programme deliverables

#### 2.149 18 Month (24 Month for EP+) Priorities

- For Franchising – initial market engagement, commencing of steady state recruitment, commencing key programme deliverables, be ready for procuring contracts
- For EP+ - completion of all transition activities under the new Enhanced Partnership

2.150 Subject to the decision, it is proposed to report back to members at the next Combined Authority meeting in June with further details on the programme of work for mobilisation.

### **3. Tackling the Climate Emergency Implications**

3.1 A key aim of bus reform is to support decarbonisation of the local bus network and provide improved sustainable travel options for the region, to support West Yorkshire's response to the Climate Emergency.

### **4. Inclusive Growth Implications**

4.1 A key aim of bus reform is to ensure the local bus network better supports the Combined Authority's inclusive growth ambitions, including by ensuring better bus connectivity in areas of economic deprivation to major employment sites.

### **5. Equality and Diversity Implications**

5.1 An Equality Impact Assessment has been developed and consulted on to support the Proposed Franchising Scheme, this is included as Appendix 2 to this report. The Equality Impact Assessment concluded that the Proposed Franchising Scheme would have a positive impact on protected characteristics of age, (especially younger and older people), disability (people with physical and sensory impairments), gender reassignment, race, sex, sexual orientation, and pregnancy and maternity. No impact, or neutral impact was seen across the protected characteristics of religion or belief, marriage, and civil partnership.

5.2 The response to the comments raised in the consultation relating to the Equality Impact Assessment can be found in the Consultation Response Report attached at Appendix 2. The main issues raised in the consultation were around vehicle specification, the importance of personal safety, and the ongoing involvement of persons with protected characteristics. An updated Equality Impact Assessment has been provided at appendix



6 to the Consultation Response Report and it should be noted that the Equality Impact Assessment is a live document and further data and insight will be used in the future. If the Proposed Franchising Scheme is made the Equality Impact Assessment will be reviewed after 12 months of implementation.

## **6. Financial Implications**

- 6.1 The costs of the decision on implementing either the Proposed Franchising Scheme or the Enhanced Partnership Plus, including the transition costs, are set out within the Financial Case of the Bus Reform Assessment.
- 6.2 In West Yorkshire, changing to franchising would require an initial, one-off investment by the Combined Authority of £15.1m over four years (transition cost). This would cover things like consultancy, mobilisation, and IT costs. Transition management costs for that four-year period would be an additional £5.3million. The Assessment also sets out the additional costs to the initial one off transition costs associated with implementing the Proposed Franchising Scheme in relation to investing in depots (£85.5million) and fleet (£252 million) over a 15 year period, which would be owned by the Combined Authority. The transition costs for implementing Enhanced Partnership Plus would be £1.9million over a 2-year period.
- 6.3 It is proposed that the initial mobilisation costs for the agreed option are funded from the remaining balance of the approval to produce the assessment, which would provide up to £2,883,150 from the Single Investment Fund. Should the decision be made to progress franchising then further information on the full mobilisation and transition costs required and the recommended means of funding these will be brought to the June meeting of the Combined Authority. The costs of funding the transition costs of the Enhanced Partnership Plus are affordable within the remaining balance of the assessment funding approval.

## **7. Legal Implications**

- 7.1 As set out in the Act, the function of deciding whether to make a franchising scheme is a function of the Combined Authority exercisable only by the Mayor acting on behalf of the Combined Authority.
- 7.2 In making any recommendation to the Mayor that she should make a franchising scheme Members need to be satisfied that:
- the process followed is lawful;
  - the consultation process was fair and enabled respondents to consider all relevant issues and provide an intelligent response;
  - the responses to the Consultation have been appropriately considered and taken into account;

- there is sufficient information to enable the Combined Authority and the Mayor to make such a decision;
- that they have balanced the issues set out by consultees; and
- that they have had due regard to the matters set out in section 149 of the Equality Act 2010 (the Public Sector Equality Duty).

7.3 Members will note that each of these issues is addressed in the Consultation Response Report attached as Appendix 2.

7.4 Officers and external legal advisors are satisfied that the requirements of the legislation have been met in the preparation of the Assessment, the independent Audit of that Assessment and the Consultation on the Assessment.

7.5 The Mayor will also need to consider those matters set out at 7.2 when taking a decision as to whether or not to make a franchising scheme.

7.6 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

8.1 The staffing implications of a decision on whether to implement the Proposed Franchising Scheme (or the Enhanced Partnership Plus) are set out within section 2.3 ('Extending the Combined Authority's responsibilities to deliver EP+') and section 2.4 ('Extending the Authority's responsibilities to deliver Franchising') of the Management Case of the Bus Reform Assessment, provided as Appendix 1 to this report.

## **9. External Consultees**

9.1 This report has been informed by the outcomes of the statutory Bus Reform consultation, as set out in Section 2 of this report. A full independent summary of the consultation, completed by DJS Research is included as an appendix to the Combined Authority's Consultation Response, provided as Appendix 2 to this report.

## **10. Recommendations**

10.1 That the Combined Authority:

10.1.1 Notes the completion of the consultation process, its extent and the responses received;

10.1.2 Notes and considers the contents of the Consultation Response Report at Appendix 2 and associated documents, including the Bus Reform Assessment, and endorses the Combined Authority's response to the consultation summarised in this report and set out at Appendix 2;

10.1.3 Recommends to the Mayor that she makes a franchising scheme as set out at Appendix 3, complying with all associated statutory requirements, rather than recommending that the Combined Authority pursues an Enhanced Partnership Plus.

10.1.4 When the Mayor has decided whether or not to make a franchising scheme agree:

- to adopt and publish the Combined Authority's response to the consultation, together with the Mayor's decision as the report to be published by the Combined Authority under section 123G (1) of the Transport Act 2000 (the "Act");
- in accordance with s123G(2) of the Act to give notice to the traffic commissioner (.

10.1.5 If the Mayor decides to make a franchising scheme:

- to publish the scheme set out at Appendix 3 on behalf of the Mayor at the same time as the Consultation Response Report (Appendix 2) to be published under section 123G(1) of the Act;
- at the same time publish a transitional notice in the terms set out in Appendix 4 and then within 14 days of date upon which transitional notice is published, to give notice to the traffic commissioner of its publication on behalf of the Mayor if the Mayor so decides (or alternatively WYCA) as required by the *Public Service Vehicles (Registration of Local Services) (Franchising Schemes Transitional Provisions and Amendments) (England) Regulations 2018*;
- to agree that, in conducting the procurement process for the provision of local services, the Combined Authority will facilitate the involvement of small and medium sized operators in the provision of local services as set out at Appendix 5 (s123 G (3) of the Act);
- to commence with mobilisation of franchising, noting section 0 of this report (Mobilisation).

10.1.6 If the Mayor recommends that the Combined Authority pursues Enhanced Partnership Plus:

- to commence with mobilisation of Enhanced Partnership Plus, noting section 0 of this report (Mobilisation).

10.1.7 Approves the repurposing of the remaining £2,883,150 funding approved for the preparation of the assessment to be used for initial mobilisation costs.

## 11. Background Documents

National Bus Strategy

Bus Service Improvement Plan

## 12. Appendices

Appendix 1 [The Bus Reform Assessment](#)

Appendix 2 [The Consultation Response Report](#)

Appendix 3 [Proposed Franchising Scheme](#)

Appendix 4 [Draft Transition Notice](#)

Appendix 5 [Impact on Small and Medium Sized Operators Position Paper](#)

<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 <sup>th</sup> March 2024
<b>Subject:</b>	<b>West Yorkshire Mass Transit: Outcomes from the first Strategic Outline Case in advance of submission to the DfT and subsequent consultation and engagement activities.</b>
<b>Director:</b>	Luke Albanese, Mass Transit Director
<b>Author:</b>	Tim Lawrence, Interim Head of Transport Planning and Appraisal - Mass Transit

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 The purpose of this report is to update the Combined Authority on the progress and development of the Mass Transit Phase 1 Strategic Outline Case (SOC), providing an overview of the key points, in advance of submission to Department for Transport (DfT) and to seek approval to commence wider stakeholder engagement and consultation.
- 1.2 This paper presents an overview of the SOC, highlighting the key outcomes which form the preferred way forward of the Phase 1 of the West Yorkshire Mass Transit Network.
- 1.3 As the SOC is subject to assurance by the Department for Transport (DfT), it is considered prudent that the current draft is treated as confidential until that assurance has been completed. In addition, the SOC document contains a level of commercially sensitive information around the potential for land value changes as a result of possible route information entering the public domain at this stage. For these two reasons, the full SOC has not been shared with this paper, however the key outputs have been detailed in this report.

- 1.4 The report seeks Combined Authority approval of three key decisions:
- a) To note the SOC work that has been undertaken and delegate submission of the SOC to the DfT to the Mayor and Executive Director for Transport for submission to the Department for Transport.
  - b) Approval to continue development of Phase 1 of the Mass Transit Programme and to commence work on development of the Outline Business Case and Transport and Works Act Order application.
  - c) Approval to commence wider stakeholder engagement in March 2024 and public consultation on Phase 1 in Summer 2024.
- 1.5 The report also sets out the case for approving the allocation of up to £1 million funds from the Mass Transit budget to support the Dewsbury Line Development Project in parallel with the development of the future Kirklees Local Plan.

## 2. Information

### Background

- 2.1 At the Combined Authority Meeting of 17<sup>th</sup> March 2022 members approved the commencement of an Outline Business Case (OBC) for the Programme Integration Business Case and *the commencement of a Strategic Outline Case for the four phased corridor projects* within the programme and referenced in the Mass Transit Vision.
- 2.2 In its Mass Transit Vision 2040, West Yorkshire Combined Authority sets out its bold vision to make West Yorkshire greener, more inclusive and better connected and that to achieve this, West Yorkshire needs an equally bold approach to public transport.
- 2.3 Alongside cycling and walking, and bus and rail, Mass Transit is essential to help communities thrive and our economy flourish, bringing people and places closer together. By offering a new public transport option, which increases capacity and provides an attractive alternative to car travel, Mass Transit will support and facilitate:
- A low emission, low carbon, inclusive future
  - A bigger, stronger and rebalanced economy – increasing access to jobs, education and training.
  - Enhanced quality of life for West Yorkshire’s residents and visitors.
  - Inclusive growth through improving transport for up to 675,000 people within the top 20% most deprived communities within West Yorkshire
  - Sustainable development and regeneration of neighbourhoods, district centres, towns and cities.
- 2.4 The Vision is part of an integrated transport plan, providing alternative transport options for different types and lengths of journeys, helping to address the capacity challenge in different ways. For example, Mass Transit and local rail are seen as **complimentary** with Mass Transit providing much needed capacity, quality and connectivity and a step

change in quality, helping to provide local journeys with a real step-change alternative to the car, whereas rail can cater for interurban, regional, and national journeys.

- 2.5 The Vision anticipates that the delivery of the first phase will be based around the 4 corridors identified overleaf:

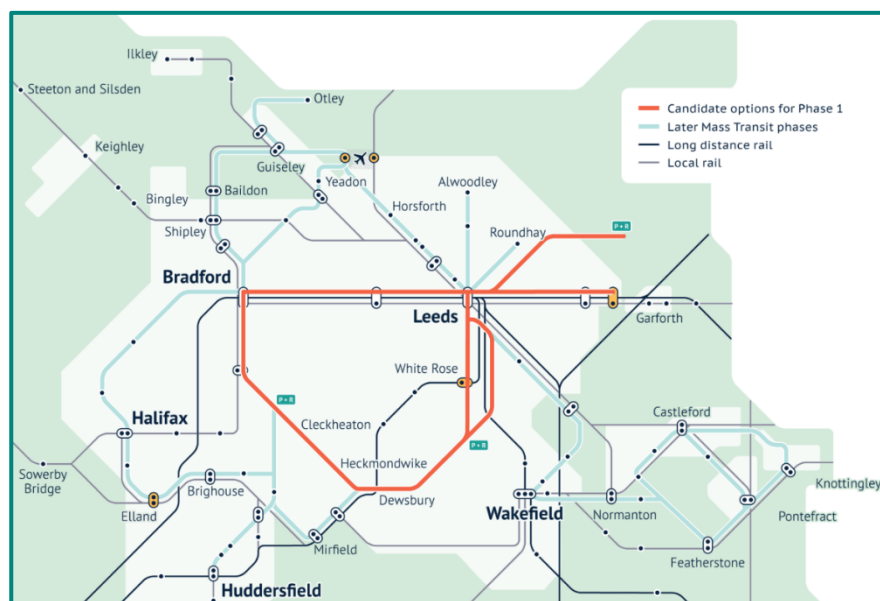


Figure 2.1: Mass Transport Vision 2040 - "candidate options for Phase 1"

- 2.6 The corridors were:

- East Leeds (including both East Leeds Park and Ride and East Leeds to Garforth route options)
- South Leeds to Dewsbury (including both Middleton and White Rose route options)
- Bradford to Leeds
- Bradford to Dewsbury

- 2.7 As the SOC has progressed it emerged that some of the candidate corridor options for Phase 1 (Figure 2.1) were deemed less favourable through option sifting (predominantly due to low forecast travel demand) and therefore the focus moved to those candidate corridors that have been identified as having the potential to provide a stronger business case for Mass Transit. This preferred way forward for Phase 1 has been communicated to MP's, senior elected members and senior Officers in the Districts affected. It is set out in the SOC and in this paper and is what Members are being asked to approve.

- 2.8 As noted above, not all candidate options for Phase 1 that were considered as part of this SOC will be taken forward to OBC. However, this does not mean that they will not form part of the Mass Transit future network. As the programme is developed, further work will be undertaken to understand the potential demand, taking into account future housing, employment and regeneration opportunities and aspirations.

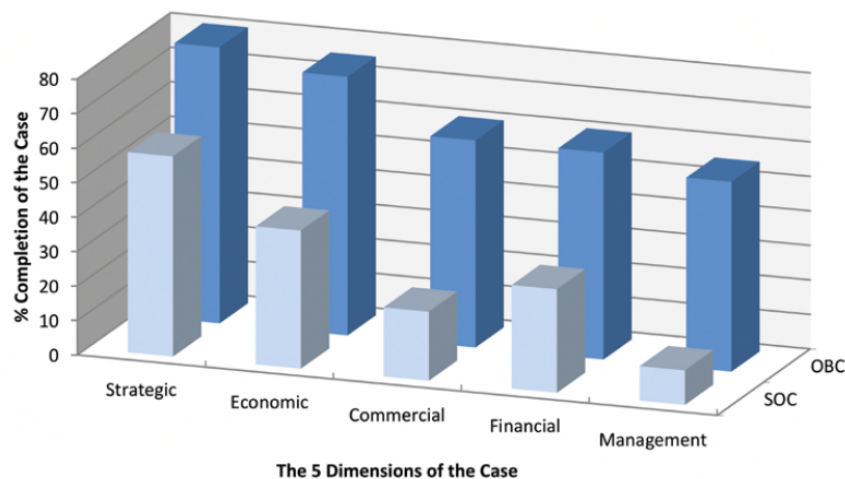


- 2.9 Initial transport modelling and analysis of the Bradford to Dewsbury corridor highlighted low passenger demand based on currently known forecast scenarios, which resulted in this corridor not being considered viable as a potential Phase 1 option. However, the need to close the connectivity gap between Bradford and Dewsbury is recognised and this corridor, along with other corridors (including the East Leeds Corridor) which were sifted during the SOC appraisal process will be revisited as part of subsequent Mass Transit corridor appraisals and are therefore still potential candidate corridors in the future Mass Transit network.
- 2.10 The Mass Transit Vision is clear that to ensure that no part of West Yorkshire is left behind development work will continue with district partners on all potential transit corridors with possible second and third phases coming online after 2033.

### 3. The Strategic Outline Case (SOC)

#### Overview

- 3.1 The SOC has been developed following the Treasury Green Book's five case business case model and has been undertaken in compliance with DfT Transport Analysis Guidance (TAG). This is split into the five dimensions (Strategic, Economic, Financial, Commercial and Management). Based on a proportionate approach, at SOC stage the evidence is weighted towards qualitative assessments (see below figure), with a focus on the Strategic Dimension, although early development of the other dimensions should also feature.



#### SOC Development

- 3.2 At SOC stage it is important to have a strong candidate option for phase 1 as it greatly increases the potential for the DfT to recognise it as a strong business case for the award of funding and provide a keystone for further network development. The SOC has been developed following the Mass Transit Vision and the work that supported it. For the three corridors under consideration in this SOC, light rail/tram is proposed as the leading and preferred technology option, bearing in mind that DfT/HMT also require a lower cost option to be similarly appraised for all corridors.



- 3.3 To undertake the option assessment, potential route options within the corridors were designed and a two-stage sifting process was developed. These potential route options had been developed in parallel as part of a design process in partnership with Leeds City Council and Bradford Council and Kirklees Council.
- 3.4 Building on the existing evidence base and utilising a variety of modelling and data sources, the potential routes were sifted using a two-stage process as summarised below and illustrated in Figure 3.1 below:

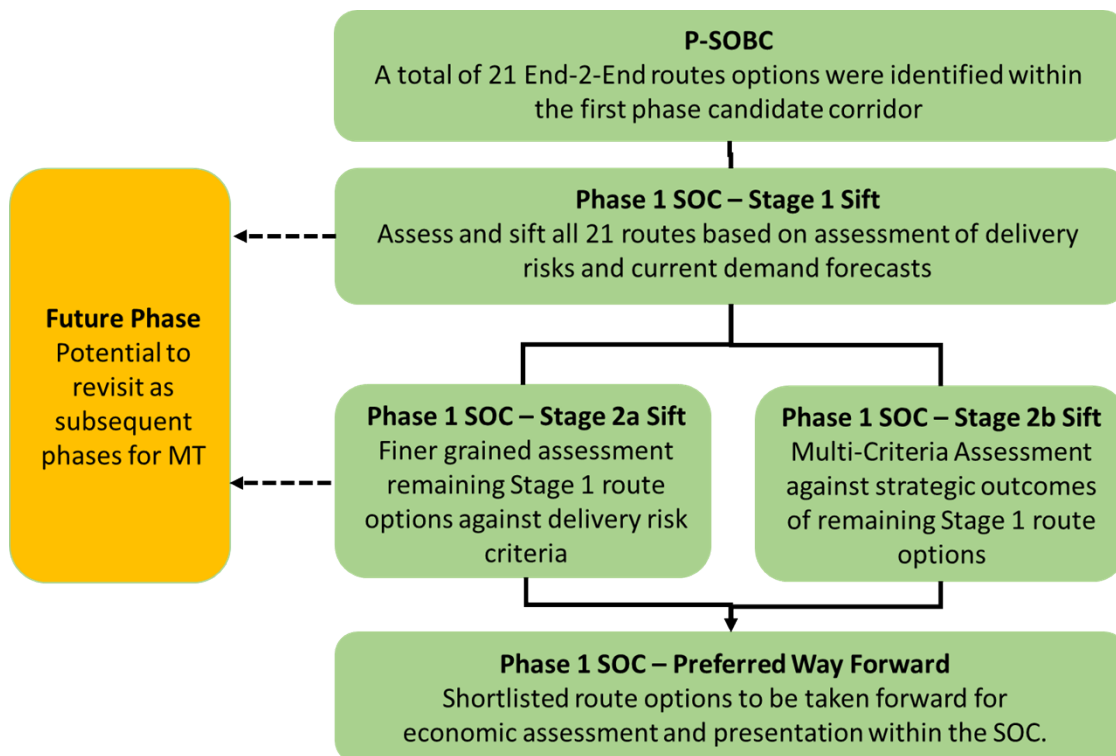


Figure 3.1: Option Assessment sifting process and stages

- 3.5 Any route option which was moved into the “Future Phase” category (Figure 3.1) through the sifting process, means that the option is not considered as a suitable candidate for first phase implementation.
- 3.6 The process used to arrive at the two corridors to take forward (Preferred Way Forward) to OBC from an initial list of four, has been undertaken in line with Central Government Treasury Green Book’s five case business case model and compliant with DfT Transport Analysis Guidance. The establishment of this core network will give us the opportunity if these development-based conditions change over time to go back to these areas and look at them again and investigate whether certain routes could be brought forward, or whether they might be suitable for alternative modal treatments as part of the developing West Yorkshire Integrated Transport Network.

## SOC Phase 1 – Conclusions (Preferred Way Forward).

### **Phase 1a: Leeds and Bradford Lines**

- 3.7 Consolidating and reviewing the results from the two-stage option assessment and appraisal exercise, the SOC identified two corridors that together should be taken forward to the OBC Phase 1a of the wider West Yorkshire Mass Transit network. Serving these two corridors will be the hubs of Mass Transit which are Leeds and Bradford City Centre, including a common route section between St James's University Hospital and Leeds city centre, therefore providing a strong baseline for further phases of the Mass Transit network, including initial depot provision. To confirm, the two initial lines that are proposed are:
- **The Leeds Line**, which will operate between St James's University Hospital and White Rose via Leeds city centre and Elland Road.
  - **The Bradford Line**, which will operate from St James's University Hospital to Bradford Forster Square via Leeds city centre and a planned new railway station south of Bradford city centre.

### **Phase 1b: Dewsbury Line Development Project**

- 3.8 Officers have worked with colleagues in Kirklees Council to review the case for the southern section of the Leeds to Dewsbury route from the White Rose to Dewsbury. The full corridor does not form part of the Phase 1a proposals at this stage due to the early status of wider development plans along the potential alignments, pending the progression of the Local Plan process agreed by Kirklees Council in recent months. By bringing forward plans for housing and mass transit through the Local Plan, the Dewsbury extension offers a unique opportunity to secure sustainable and successful communities and commercial development from the outset.
- 3.9 Therefore, it is proposed that a development fund of up to £1,000,000 from the Combined Authority's Mass Transit budget is set aside to support the Dewsbury Line Development Project, with further TWAO funds to be drawn down from a CRSTS 2 submission, subject to successful development of their Local Plan supporting Mass Transit appropriately.

#### Leeds Line

- 3.10 There remain several route options which will be considered further as Phase 1a South Leeds Outline Business Case is developed, leading to the identification of a Phase 1a South Leeds Preferred Option. The intention is that this is then subject to a Transport & Works Act Order application.

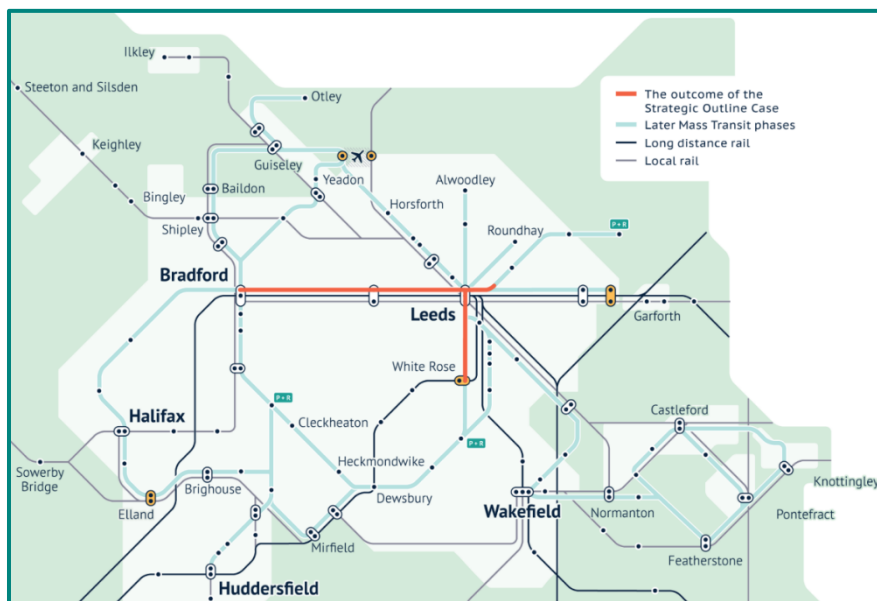
Of the options considered, Leeds City Council has a strong preference for those on the White Rose corridor. Leeds City Council and the Combined Authority propose that the White Rose options offer the greatest potential to support redevelopment and regeneration by bringing previously developed or existing low-density sites into more productive use and providing a link to Elland Road stadium. The potential regeneration benefits that a fast, reliable, high-capacity transport link would provide to such

destinations within this area support Leeds City Council's preference for an alignment that would best facilitate this opportunity.

- 3.11 In summary Leeds City Council has a strong preference that Mass Transit should support and facilitate redevelopment and regeneration in the city, and specifically that Mass Transit should be integral to its emerging South Leeds Strategic Vision. To that end, the Middleton route options, and that associated corridor have been removed from the preferred way forward for Phase 1a SOC.

### Bradford Line

- 3.12 The SOC has identified a strong strategic case to link Leeds and Bradford and define them as the two hubs of this first phase of Mass Transit. Bradford Council's plans to regenerate the southern gateway including a new train station will play a key part in shaping the Bradford line and will define the city's future transport hub. The line will complement the parallel fast city-to-city electrified rail service. The siting of the station is yet to be determined but this will be a key factor in helping us frame the Bradford Line more precisely. Further work is being and other partners (Network Rail, DfT etc.) to determine this.
- 3.13 Figure 3.2 below shows the Phase 1a preferred way forward for the Leeds Line and Bradford Line diagrammatically. This is the result of the SOC and therefore what Combined Authority members are being asked to approve:
- That potential routes identified within these corridors have a sufficiently strong business case, that they introduce operable and coherent transport options, they have support from both Bradford and Leeds Councils and when considered against other options (including those routes shown as potential future route options) have a lesser risk of deliverability and therefore can realise benefits of Mass Transit at the earliest opportunity.



• Figure 3.2: The preferred way forward (Phase 1 SOC)

### Cost, Benefits and Funding

- 3.14 As part of SOC development a cost estimate of the scheme has been produced. This cost estimate has been based on the maturity of the designs at this stage in the process and checked against benchmarks from around the country. Based on the work carried out to date, Phase 1 is likely to be a £2bn+ investment.
- 3.15 This figure needs to be set against recent government announcement where:
- The Leeds City Region is one of four city regions to receive a share of £22bn for major public transport schemes, as recommended by the National Infrastructure Commission (October 2023); and
  - The Network North plan provisionally allocated a sum of £2.5bn over City Regional Sustainable Transport Settlements 2 and 3 (2027-32 and 2032-37).
- 3.16 As part of the assurance process at this stage in the development of the scheme, the DfT would like to see an early indication of the traditional economic benefits, set against the cost detailed above. There are many factors to take into account when determining economic benefits of a mass transit scheme. Two factors of significant importance that go into generating good levels of economic benefits are: 1- forecast levels demand and; 2- how potential disbenefits to existing highway users will be dealt with either as part of the development of the scheme or (and this is more advantageous) as part of a wider policy of demand management that looks to lessen the use of the private car, in parallel with, (and not as a result of), the introduction of mass transit. Therefore, those highway disbenefits are not taken into account when calculating economic benefits of the mass transit scheme.
- 3.17 Taking these factors into account in the current assessment, there is currently a confidence that both corridors proposed in this SOC will provide cost benefit ratios of around 1, i.e. they would deliver approximately £1 of benefit for each £1 spent. This cost benefit ratio takes into account significant one-off upfront costs such as depot and initial rail vehicle fleet provision in addition to the cost of constructing the route.
- 3.18 This level of benefits is entirely typical for public transport light rail projects at this stage in their development. There is more detailed modelling work to be undertaken with the new Regional Transport Model that we are developing and there are still a number of wider economic benefits and regeneration benefits to be considered as part of the economic analysis. This means that we fully expect the cost benefit ratio to increase at outline business case stage.
- 3.19 In the development of the OBC there will need to be consideration of local funding contributions. A strong Local Contributions Statement will be needed for OBC/TWAO submission, and a Full Local Contributions Plan will be needed for Full Business Case (FBC) and final funding negotiations. The current scale of likely costs suggests a local fund of c.£500m would be required in the first instance. This Equates to c.£30m per annum finance costs (based on 30-year prudential borrowing).

- 3.20 Running in parallel to the Business Case, work on a multi-source funding package is now underway. This will ensure that West Yorkshire is in the best place to capitalise on all funding opportunities and grants as they become available and gives HMG some surety around our strategy for funding.

#### Implication for SOC Submission to DfT

- 3.21 The submission of the SOC initiates the formal DfT assurance process, where the scheme will be appraised in line with national guidance for scheme appraisal. The outcome sought is an approval from DfT and HMT that the business case at SOC level is sufficiently strong and robust and therefore that there is an agreement to progress onto the development of the OBC.
- 3.22 Following Ministerial sign-off of the SOC, the Phase 1 preferred way forward moves into OBC stage, with greater design detail, analysis and appraisal of the scheme. After OBC it is expected that the final Phase 1 scheme will be taken forward through a Transport and Works Act Order (TWAo), with construction currently programmed to commence in 2028.

## **4 Consultation and Stakeholder Engagement**

- 4.1 Should CA members be minded approving submission of the SOC to the DfT, Officers would like to make a start on wider stakeholder engagement in March and commence a route options consultation in Summer 2024 on the routes (Leeds Line and Bradford Line) within the corridors to be taken forward to OBC.

#### Stakeholder Engagement

- 4.2 The approval requested is to commence wider engagement with statutory and technical stakeholders. This activity is designed to facilitate one-to-one meetings with both statutory and technical stakeholders. These interactions are aimed at gathering valuable insights and perspectives on the proposed route options.
- 4.3 Furthermore, permission is sought to conduct environmental and topographical surveys on privately owned land. These surveys are integral to the environmental statement, a vital component of the TWAo. Due to their seasonal nature, the timing of these surveys is crucial and depends on specific periods throughout the year. Consequently, obtaining approval to carry out these surveys is key.
- 4.4 Proactive communication with landowners, political stakeholders in areas where surveys are planned, and engagement with district partners will be undertaken to ensure clear and consistent communication and minimise any potential concerns and demonstrate a transparent approach.

#### Route Options Consultation

- 4.5 The Phase 1 options consultation will be non-statutory and will take place in summer 2024. The consultation will be on both the Leeds Line and Bradford Line options. Potential route options for both lines will be shown. Additional information such as the advantages and disadvantages of these routes and regeneration / placemaking opportunities that Mass Transit will connect to along these potential routes will also be

provided allowing stakeholders to feedback their views on the route options and the placemaking opportunities.

- 4.6 This information will enable the Mass Transit project team to understand stakeholders' views through non-statutory consultation feedback to help guide the design and consenting process.
- 4.7 As the scheme is in the very early stages of consultation, it is recognised that it is too early to specify which properties or land will be directly affected by Mass Transit Phase 1a route options. Work is underway to develop a support scheme for property owners and will be published in due course.

## **5. Tackling the Climate Emergency Implications**

- 5.1 Carbon emissions generated by transport are currently at levels that, without significant intervention and changes to processes, a net zero carbon future by 2038 will not be achievable. Road transport is the biggest contributor to roadside air pollution with cars being the largest source of emissions.
- 5.2 To meet the 2038 net zero target, and even with a shift to zero/low emission vehicles, analysis suggests that a reduction of total vehicle kilometres exceeding 20% is necessary, accompanied by an increase in the use of sustainable modes (walking and cycling) and public transport. Transit also has the opportunity to support improvements to air quality and contribute to carbon reduction goals by providing an attractive lower carbon, lower emission transport option. Increased capacity provided by Mass Transit will allow for additional capacity on congested corridors, which affords the opportunity to improve vehicle flows which in turn will improve air quality.
- 5.3 Approval of the SOC will bring delivery one stage closer and allow more detailed work that will allow for the implementation of a carbon management process and the assessment of whole life carbon (WLC) impacts at all major lifecycle stages.

## **6. Inclusive Growth Implications**

- 6.1 A central common theme of the Mass Transit Vision 2040 and something that will be expanded in the detailed design phase of OBC is that investment in transport accessibility will make a positive contribution to driving forward inclusive growth.
- 6.2 Our approach to transport and how we will use Mass Transit is we will seek to provide it as a practical alternative to the private car that will help to tackle air quality issues and help provide access to jobs and education, especially for people currently less likely to access these opportunities. All routes have been assessed against whether they support accessibility for the hardest to reach communities to realise economic opportunities.

## **7. Equality and Diversity Implications**

- 7.1 During 2021, an ambitious statement of intent for Mass Transit and EDI was developed as part of a wider effort to strengthen the EDI approach for the Mass Transit Programme. This Statement of Intent outlines the Combined Authority's ambition for Mass Transit to be best in class regarding accessibility and inclusion as part of an integrated transport plan. EDI will be at the heart of its development and design.

7.2 The statement of intent was developed further into the 'People First' chapter of the Mass Transit Vision 2040 document, building upon one of the key design principles outlined within the Mass Transit Vision.

7.3 Running through the heart of the Business Case and the Design work for Mass Transit is the development of an EDI Strategy for Mass Transit that will anchor and provide guidance around how the EDI statement of intent and 'People First' element of the Mass Transit Vision will be embedded into the continued design and development of Mass Transit.

## **8. Financial Implications**

8.1 The City Region Sustainable Transport Settlement has awarded West Yorkshire Combined Authority a grant of £200 million of which £175 million is for development and enabling works for phase 1. At the West Yorkshire Combined Authority meeting of the 17<sup>th</sup> of March 2022, £31 million was made available to develop the SOC and the Programme Integration Business Case (Transport modelling).

8.2 It is the intention to ask members to approve further funding from the £175 million allocation to continue development of the phase 1 Outline Business Case at a subsequent CA meeting, post the DfT assurance and recommendation of the SOC.

8.3 As part of ongoing development around scheme design and developing the Business Case, the Internal Leadership Board and in-line with delegated authority, approved the award of a contract for the Mass Transit Design Development Partner. The contract has a potential maximum value of £30 million and is spread over a 10-year period. The award of this contract will allow, (subject to the approval to draw down more funding from the £175 million referenced above and a satisfactory outcome from the DfT's assurance) work to commence as soon as possible.

8.4 It is important to note that at this moment any approval from the Combined Authority to submit the SOC has no direct ramifications or does not commit the CA or partner authorities to any financial commitment.

## **9. Legal Implications**

9.1 There are no legal implications directly arising from this report.

## **10. Staffing Implications**

10.1 An Organisational Design business case was developed by the CA which supported the selection of an option to establish a new Mass Transit Directorate and combine the development of a permanent in-house Mass Transit team supplemented where necessary with temporary and specialist contracted and/or seconded resources.

10.2 This approach has sought to develop an appropriate internal Mass Transit capability to support the effective development and delivery of the Mass Transit Programme within a dedicated, credible and collaborative directorate.

10.3 The organisational structure is made up of Programme Management, Project Management and Technical teams, supported by enhanced corporate functions across

the Combined Authority, required to deliver the development stage and plan for future delivery stages.

- 10.4 The formation of the organisation was based on a combination of existing and new job profiles and sequenced to draw on the best available resources both internally and externally sourced. The approach was reviewed with Combined Authority directors and district partners and draws on industry experience and learning from development of similar programmes.

## **11. External Consultees**

- 11.1 No external consultations have been undertaken.

## **12. Recommendations**

- 12.1 That the Combined Authority:

- Notes the SOC work that has been undertaken and delegate submission of the SOC to the DfT to the Mayor and Executive Director for Transport for submission to the Department for Transport.
- Approves continued development of Phase 1a of the Mass Transit Programme and to commence work on development of the Outline Business Case and Transport and Works Act Order application.
- Approves commencing wider stakeholder engagement in March 2024 and public consultation on Phase 1a in Summer 2024.
- Approves the allocation of up to £1 million funds from the Mass Transit budget to support the Dewsbury Line Development Project in parallel with the development of the future Kirklees Local Plan.

## **13. Background Documents**

There are no background documents referenced in this report.

## **14. Appendices**

None.



<b>Report to:</b>	The West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Better Homes Hub</b>
<b>Director:</b>	Liz Hunter, Director of Policing, Environment and Place
<b>Author:</b>	Nadia McPherson, Programme Development Lead

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this report

- 1.1. To provide the Committee with an update on the Better Homes Hub programme and seek support for the development of a business case for a retrofit one stop shop.

## 2. Information

### Introduction

- 2.1. West Yorkshire declared a climate emergency in 2019 and has a target to be net zero carbon by 2038. Housing is responsible for 3.4 million tonnes (around 30%) of carbon dioxide each year in West Yorkshire, the majority of which come from using fossil fuels to heat homes<sup>1</sup>.
- 2.2. To achieve our net zero targets, we need to retrofit 680,000 homes to a good level of thermal efficiency<sup>2</sup>. As well as improving the thermal efficiency of buildings, installing low carbon heating and solar PV (solar panels) will be critical.

<sup>1</sup> UK local authority and regional greenhouse gas emissions national statistics, 2005 to 2021 - Department for Energy Security and Net Zero

<sup>2</sup> [West Yorkshire Carbon Emission Reduction Pathways report](#)

- 2.3. The Better Homes Hub (BHH) programme is directly drawn from one of the actions within the [Climate and Environment Plan](#). The BHH is the Combined Authority's regional programme to scale-up domestic retrofit.
- 2.4. As outlined by the UK Green Building Council's Retrofit Playbook<sup>3</sup>, the barriers to retrofit are complex and interdependent. Therefore, to overcome the barriers and make significant progress requires a holistic approach to address all of the key barriers concurrently.
- 2.5. The BHH is a complex long-term programme that encompasses all the Combined Authority's activity on domestic retrofit, with a vision that 'Everyone in West Yorkshire can live in a warm, comfortable, and low carbon home'.
- 2.6. The BHH has three overarching objectives which are to:
  - Objective 1: Build consensus within West Yorkshire on priorities for retrofit and energy efficiency of homes.
  - Objective 2: Deliver retrofit projects in West Yorkshire that build momentum, strengthen the supply chains, and create new delivery models.
  - Objective 3: Establish the BHH as a trusted entity for all residents to access advice and information on retrofit and energy efficiency of homes in West Yorkshire.

#### One Stop Shop (OSS)

- 2.7. The purpose of the One Stop Shop is to provide a 'single front door' for trusted information, advice and support to all residents and landlords in the region to stimulate demand in domestic retrofit. This includes signposting residents and landlords to other services where relevant.
- 2.8. One stop shops can take many different forms and refer to different business models, as outlined in this report by Energy Cities: [How to set up a One-Stop-Shop for integrated home energy renovation](#).
- 2.9. The West Yorkshire domestic retrofit one stop shop must support the vision of the Better Homes Hub that 'Everyone in West Yorkshire can live in a warm, comfortable and low carbon home'. Therefore, it must not focus only on the able to invest market. It is expected that the one stop shop will be 'inclusive by design', in that inclusivity is considered from the outset of options development, rather than adaptations being made later for accessibility. It is also expected that the one stop shop will provide information, signposting and guidance for the domestic retrofit supply chain audience.

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<sup>3</sup> [The Retrofit Playbook](#) (2021)

- 2.10. A consortium led by Energy Saving Trust has been appointed as client-side support for the BHH programme. They will provide expert advice and a robust evidence-base to drive our decision making for the programme, having had experience managing energy saving retrofit schemes on behalf of the Scottish Government through [Home Energy Scotland](#).
- 2.11. One of the key projects for the client-side support consultant is to complete an options assessment, establish a preferred way forward and produce a fully costed implementation plan for a regional one stop shop information and advice service, linked to objective 3. This work builds on existing best practice and learnings from other schemes in the UK and Europe including the [Sustainable Energy Authority of Ireland](#), [the French MaPrimeRénov scheme](#) and [Home Energy Scotland](#).

<b>Name</b>	<b>About</b>	<b>Model</b>	<b>Impact</b>
Sustainable Energy Authority of Ireland	Ireland launched a major home retrofit programme in March 2023.	All-inclusive	1400 applications, 680 deep home retrofits completed. 98% include a heat pump.
MaPrimeRénov	French national one stop shop offering joined up support for owner-occupiers including online tools, assessments, retrofit management support and list of accredited installers.	All-inclusive	In 2022, 670,000 renovations including 156,000 heat pumps and 66,000 whole-house retrofits (69% in lowest income group). 90,000 jobs.
Home Energy Scotland	Advice services including specialist and in-home support, access to funding (0% interest loan and grants), digital assessment and installer finder tools.	Facilitation / coordination	In 2020/21, total attributed lifetime savings of 71,300 tCO2 and lifetime financial benefits of £30.6 million.

- 2.12. Energy Saving Trust presented four different options for the OSS to the last Climate and Environment Committee, these are:
- **Facilitation** which informs, advises, and motivates households but otherwise take a hands off approach - largely just signposting to other services.

- **Coordination** which is one step up in that it would support households in coordinating with installers. It would not be responsible for the quality of work delivered but may set some quality standards for the supply chain referrals.
  - Thirdly, an **All-inclusive model**, which is more involved again in that it provides a fully guided process to households from information and advice through to being responsible for the quality of work delivered.
  - The final option considered is the **ESCO**, which would provide guarantees on energy savings of work delivered.
- 2.13. Energy Saving Trust are considering associated risks, likely impact and cost of each of these options, incorporating views from local authority partners and presented at the Climate and Environment Committee.
- 2.14. The Climate and Environment Committee discussed the benefits of the models, including the all-inclusive model which is flexible depending on how much support the household requires (for example providing only advice and signposting where that is all that is needed).
- 2.15. In order to minimise risk to the Combined Authority and to accelerate delivery timescales, Energy Saving Trust have recommended that the Combined Authority procures external suppliers to deliver the advice provision and the delivery function.
- 2.16. Next steps are for the Combined Authority to develop the full business case for the OSS, looking at all options, which will be submitted in Autumn 2024. In order to maintain pace, procurement activity and working with the market will also commence.
- 2.17. Due to the level of complexity and the need to develop the retrofit and renewables supply chain, the recommendation is to phase delivery of the OSS over a five-year period beginning at the end of 2024.

#### Other projects within the Better Homes Hub programme

##### **Local Energy Advice Demonstrator**

- 2.18. The BHH team were successful in securing a total of £836,833 in funding from the Local Energy Advice Demonstrators competition from the Department for Energy Security and Net Zero. This project will test approaches of delivering in-person energy advice to two hard to reach communities - the elderly and those who do not speak English as their first language.
- 2.19. Groundwork Yorkshire has been secured as the delivery partner for the project. Delivery began in February 2024 and the project will run until the end of March 2025.
- 2.20. Learnings from the project will be used to inform the development of the one stop shop and ensure that all West Yorkshire residents can access and benefit from the available information and advice.

### **Low-interest Retrofit Loan**

- 2.21. The cost of completing the work and access to finance are two of the main barriers to homeowners making sustainable improvements to their homes. To address this financial barrier, the Combined Authority is looking to establish a £1.5 million low-interest loan to help owner-occupiers and private landlords to fund the retrofit of their home.
- 2.22. An FCA regulated lending supplier will be procured to support the Combined Authority with management and administration of the loan facility. Loans will be available from £5,000 - £25,000 at an interest rate of 3.26% and a 10-year loan term. Using Combined Authority funding to establish the loan pot enables an interest rate that is significantly below market rate. Despite this, there is an acceptance that the loan will not be affordable and accessible by everyone and further development work is planned to establish other innovative funding models.
- 2.23. The procurement of an FCA regulated lending supplier will be completed by March and the project will be launched in May 2024.

### **Social Housing Decarbonisation Fund (SHDF)**

- 2.24. Work continues on delivery of the SHDF projects which are retrofitting social rented homes in partnership with our housing associations who have to provide match funding of between 30% and 50% to secure the grant from the Department for Energy Security and Net Zero.
- 2.25. Wave 1 is in the closure stage with final lodgements and closure report being submitted. The final outcome is 917 homes retrofitted with an overall investment of £9.77 million. The consortium is currently in the top three for England in terms of number of homes completed.
- 2.26. Wave 2.1 has a target of over 2,300 homes to retrofit with a total investment of £30 million. Installation works have started on 440 properties with 172 completed.
- 2.27. SHDF Booster, which uses the Combined Authority's Gainshare funding alongside match funding from the housing associations, aims to retrofit over 1,780 properties with a total investment of £7.24 million. To date, 824 properties have been completed.
- 2.28. Looking ahead, we expect the bid window for SHDF wave 3 to open in the summer and are working hard to ensure we are mobilised and in a position to lead another consortium bid on behalf of interested housing associations.

### **Area-based schemes**

- 2.29. The Combined Authority is working with District Partners to develop a number of area-based schemes. These will pilot retrofit measures across an area/street to test the level of interventions that can be made to properties, understand the impact these measures

will have on residents' living conditions and their energy/fuel bills, in addition to how to achieve efficiencies in delivery.

- 2.30. Each area-based scheme will focus on a different element of innovation to ensure that across the region we are able to maximise learning on how to scale-up delivery of area-based retrofit schemes.
- 2.31. The business case for the Calderdale scheme was approved at Combined Authority on 7 December 2023 and will begin delivery in March 2024. The business case for the Leeds scheme is being considered at Combined Authority on 14 March (included in a separate project approvals paper). Work continues on the development of the remaining schemes (Wakefield, Bradford and Kirklees) and these are expected to be launched in 2025.

### **Solar collective purchasing**

- 2.32. The Combined Authority is procuring an organisation to deliver a residential solar collective buying scheme in the region; this will accelerate the deployment of solar PV and battery storage systems in West Yorkshire. The scheme intends to reduce the upfront costs of solar PV and battery storage technology for the able-to-pay market, through the development of an innovative delivery model. Interested residents will be able to choose which technologies they wish to invest in – solar, or both solar and battery storage.
- 2.33. The anticipated launch date for this project is summer 2024 with installations completed by March 2025.

### **West Yorkshire Housing Partnership Solar PV and Battery Storage**

- 2.34. The scheme will install solar power generation and battery storage on up to 1500 social rented homes belonging to housing associations in the West Yorkshire Housing Partnership. The project will reduce the carbon impact of social housing and reduce energy costs for residents.
- 2.35. The total scheme costs are £15,447,642, of which £5,447,642 is funded by the Combined Authority's Gainshare Fund. The business case for this scheme was approved at Combined Authority on 7 December 2023 and delivery will begin in Spring 2024.

## **3. Tackling the Climate Emergency Implications**

- 3.1. The programmes and projects within the Better Homes Hub respond to the ambition for West Yorkshire to be net zero carbon by 2038 and the Mayoral pledge to tackle the climate emergency.
- 3.2. The projects outlined in this report contribute to progressing towards our goal of 680,000 homes to be retrofitted in the region, through establishment of a one stop shop, direct delivery of area-based schemes, the direct financial support of the low-interest loan, as

well as the progression of a robust knowledge base, and the priming of a market that is capable of providing for the extensive retrofit that is required.

#### **4. Inclusive Growth Implications**

- 4.1. The Combined Authority's definition of inclusive growth is enabling more people and places to contribute to and benefit from economic success.
- 4.2. Retrofitted homes typically result in reduced energy bills; the average band D home could save £680 per year compared to a band C home. This saving goes up to £1,249 for band E and a staggering £1,765 for band F homes, giving considerable economic gain to those in fuel poverty.
- 4.3. Inclusive growth will be supported through improvements to wellbeing whereby the comfort, health and affordability of household budgets improve following uptake of energy efficiency retrofit.

#### **5. Equality and Diversity Implications**

- 5.1. The vision for the Better Homes Hub programme is that 'Everyone in West Yorkshire can live in a warm, comfortable and low carbon home.'
- 5.2. The Local Energy Advice Demonstrator project will enable the testing of approaches to deliver in-person advice on domestic energy efficiency retrofit for hard-to-reach and digitally excluded groups. The learning from this project will then be used to inform the development of the West Yorkshire one stop shop and ensure that all West Yorkshire residents can access and benefit from the available information and advice.
- 5.3. It is recommended that the One Stop Shop implements the provision of advice using a multi-channel approach, including in-person engagement, a telephone line, and a digital platform. This approach will reduce the risk of exclusion of underserved communities and digitally excluded groups, whilst increasing access to resources for vulnerable households.
- 5.4. Offering an all-inclusive service removes barriers for vulnerable communities in minimising the number of people or services that the householder needs to engage with directly. This service will also be able to target tailored assistance to the needs of the specific household.
- 5.5. A consumer engagement and marketing strategy will be developed for the One Stop Shop. Energy Saving Trust have recommended that this strategy considers audience profiling to define personas that can then be used to define specific customer journeys, communication channels and referral routes. A multi-channel approach to marketing is recommended.

- 5.6 An interim evaluation of the One Stop Shop will be commissioned. This will seek to capture feedback from households that do not engage with the service, to ensure that evaluation does not disproportionately represent the views of households already served well by the programme while overlooking input from seldom-heard communities that could further improve inclusivity. Feedback from both participating and non-participating households will shape recommendations to enhance accessibility, affordability, and suitability for all West Yorkshire residents.

## **6. Financial Implications**

- 6.1 There are no financial implications directly arising from this report.

## **7. Legal Implications**

- 7.1 There are no legal implications directly arising from this report.
- 7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

- 8.1. There are no staffing implications directly arising from this report.

## **9. External Consultees**

- 9.1. The views of Local Authority partners and key stakeholders within the Combined Authority has informed the work being completed by Energy Saving Trust.

## **10. Recommendations**

- 10.1. That the Combined Authority notes the contents of the report.
- 10.2. That the Combined Authority support the development of a business case for the one stop shop.

## **11. Background Documents**

There are no background documents referenced in this report.

## **12. Appendices**

No appendices are included with this report.



<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>West Yorkshire Housing Strategy 2040</b>
<b>Director:</b>	Liz Hunter, Director of Policing, Environment and Place
<b>Author:</b>	Rebecca Greenwood, Head of Housing

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 This report seeks Combined Authority approval of the draft West Yorkshire Housing Strategy 2040 (attached at **Appendix 1**).

## 2. Information

### Background

- 2.1. The existing West Yorkshire Combined Authority policy position was established in the Housing and Regeneration Strategy 2014, which was built on in the Leeds City Region Housing Vision 2019. Since then, there have been significant changes to the local, regional and national operating context and political settlement, including the election of the Mayor of West Yorkshire and the establishment of a Strategic Place Partnership with Homes England. These changes have created a need for a renewed, clear strategic direction to guide our housing activity at a regional level, adding value to the vital work undertaken by local authorities and our partners.
- 2.2. In addition, the Mayor and five West Yorkshire local authority leaders launched the West Yorkshire Plan 2040 in June 2023. The West Yorkshire Plan sets out the ambitions of the Combined Authority and local authorities across five missions that collectively aim to

achieve the vision for ‘a brighter West Yorkshire’. Each objective within the Housing Strategy connects to our missions set out in the West Yorkshire Plan.

- 2.3. The West Yorkshire Housing Strategy is an opportunity to present a regional trajectory to 2040 which links to and mirrors our wider focus on inclusive growth, sustainability, equality, diversity and inclusion.
- 2.4. The Housing Strategy is an evidence-led document, which draws upon extensive research and intelligence surrounding the housing related challenges and opportunities across the region. The strategy is grounded in partnership working, recognising that the objectives and outcomes can only be realised through working together.
- 2.5. The Place, Regeneration and Housing Committee have been involved in the development of the strategy from the initial stages of preparing the evidence base, through to the public consultation and providing comments on the final draft. At its meeting on 29<sup>th</sup> February 2024, the Place, Regeneration and Housing Committee recommended approval of the draft strategy to the Combined Authority.

### **Overview and structure**

- 2.6. The Housing Strategy sets out an overall mission statement for housing in West Yorkshire and four objectives, as well as two guiding principles, that have been agreed with partners:

*Our ambition is to create safe and inclusive places to live that meet the needs of our residents.*

*We will do this by working with our partners to deliver sustainable and affordable homes in well-connected communities where people choose to live.*

***Ensuring that West Yorkshire is a place we are proud to call home.***



- 2.7. Our work to achieve this mission will focus on the four thematic objectives centred around the key challenges that our region faces. These objectives are underpinned by two guiding

principles, **sustainability** and **equality and inclusive growth**, which will act as golden threads to connect and guide our various strands of activity. Following feedback from partners, we have spent time reviewing and simplifying our objectives to more clearly reflect the activity each will likely entail.

- 2.8. In terms of structure, each objective within the strategy document is divided into two parts. The first, **rationale**, brings together the evidence base built upon the challenges our region faces within the scope of that objective. This section is important as it aims to articulate the current baseline position across the region, which the Combined Authority and partners can then use as evidence to construct programmes, interventions and communicate with external stakeholders. The second part, **outcomes**, sets out in broad terms what we would like to achieve through our activity and that of our partners in relation to the challenges identified under the objective.
- 2.9. Appendix 1 of the Housing Strategy includes our emerging delivery plan, which sets out existing activity under each objective as well as our planned actions for the first three years of the strategy period. We also set out our asks of central government and other key stakeholders, specifying the additional resources and powers that we need in order to succeed.
- 2.10. We are also developing a suite of monitoring indicators, set out in Appendix 2, which build on the high-level indicators reported annually in the State of the Region. These will allow us to monitor progress against the outcomes proposed in the strategy. We are working with our Research and Intelligence Team to consider the most appropriate approach to monitoring and reporting, which will be presented to the Place, Regeneration and Housing Committee for endorsement at a future meeting.
- 2.11. The Housing Strategy has been co-developed with partners and subject to extensive internal and external engagement over the course of its development. Senior officers and leaders within local authorities have had opportunity to review and comment on the document, and local authority officers have been heavily involved in our evidence and policy development work. Beyond this, Combined Authority officers have leveraged significant input from other public, private and third sector partners including through forums such as the West Yorkshire Housing Partnership, which brings together the region's major providers of social housing.

#### Public consultation

- 2.12. A five-week online public consultation was conducted by the Combined Authority through its YourVoice platform across November and December 2023. This resulted in 1,174 visits made to the YourVoice page.
- 2.13. We received 113 completed submissions, and results have been analysed and a full outcome report is to be published on the YourVoice platform.

- 2.14. Beyond the online public consultation, we have also made contact with seldom heard groups in the region in order to invite comments on the Housing Strategy, and to develop relationships that may enable us to focus our activity and monitor its impact on groups with protected characteristics and other minority groups. We continue to seek further engagement with seldom heard groups across West Yorkshire as we move to launch and deliver the strategy and we are working with the Combined Authorities Inclusivity Champion to broaden our engagement as much as possible.
- 2.15. The public consultation indicated significant overall support for the policy direction set out in the strategy, with the vast majority of outcomes and both guiding principles receiving levels of support in excess of 75%. Themes emerging from qualitative feedback received during the consultation reshaped some of our outcomes, for example under **Objective 2**, although there was support for additional specialist housing to support our ageing population, respondents felt that we ought to widen our focus here to also capture accommodation needed by those with physical and/or mental health conditions requiring support.

### **Next steps**

- 2.16. Subject to Combined Authority approval, the Housing Strategy will be fully designed and plans for a launch in Spring/Summer 2024 will be developed.

## **3. Tackling the Climate Emergency Implications**

- 3.1. Sustainability, as one of our guiding principles, will underpin our activity under the Housing Strategy. The Housing Strategy links to and references the West Yorkshire Climate and Environment Plan, as well as existing programmes including the Better Homes Hub, our regional retrofit programme. The strategy sets out the Combined Authority's intentions for improving the quality of new and existing housing stock, contributing to our 2038 net-zero carbon ambitions. It also sets out our response to the infrastructure and community challenges posed by the climate emergency, such as increased risks of flooding.

## **4. Inclusive Growth Implications**

- 4.1. Inclusive growth is identified as part of the 'Equality and Inclusive Growth' guiding principle of the strategy. The Housing Strategy aims to progress our work on inclusive growth, ensuring that as many people as possible, from all of our diverse communities, can contribute to and benefit from our interventions. We will work to monitor how the implementation of our strategy affects communities that may face multiple exclusion and disadvantage.

## **5. Equality and Diversity Implications**

- 5.1. The Housing Strategy is underpinned by principles of equality, diversity and inclusion. The evidence base indicates that, across all strategy areas, we must continue to work to

understand the diverse housing experiences of those with protected characteristics, as well as other marginalised and minority groups across our region.

5.2. We continue to develop our engagement with seldom heard groups across West Yorkshire to ensure the voices of diverse communities are reflected in the development and delivery of the strategy.

5.3. The Housing Strategy has been subject to a completed Stage One Equality Impact Assessment (EqIA).

## **6. Financial Implications**

6.1. There are no financial implications directly arising from this report.

## **7. Legal Implications**

7.1. There are no legal implications directly arising from this report.

7.2. In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

8.1. There are no staffing implications directly arising from this report.

## **9. External Consultees**

9.1. Engagement with partners has been carried out throughout the process of developing the strategy with feedback incorporated at each stage. A full public consultation also took place through November-December 2023.

## **10. Recommendations**

10.1. That the Combined Authority approves the West Yorkshire Housing Strategy 2040, with any final amendments delegated to the Chief Executive Officer of the Combined Authority in consultation with the Mayor.

## **11. Background Documents**

11.1. The following background documents are referred to in this report:

[Leeds City Region Housing Vision](#)

[Strategic Place Partnership with Homes England](#)

## **12. Appendices**

Appendix 1 – West Yorkshire Housing Strategy 2040



# **West Yorkshire Housing Strategy 2040**

Spring 2024

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## Foreword



In developing our first West Yorkshire Housing Strategy, I have reflected on the value of having a safe, secure and affordable place to call home. As Mayor, I have the privilege of meeting residents in every corner of West Yorkshire. I recently met a family who shared with me their experience of living in a poor quality private rented home, struggling to get repairs done and faced with the threat of eviction if they were to complain too much. When I met them, they had just moved into a new social home and were thrilled with the safety, security, warmth and longevity that their new home provided.

During our conversation I was reminded of my own experience growing up in social housing – not having to worry about uncontrollable rents, disrepair or the looming threat of a no-fault eviction. Fundamentally, housing is a basic human right and everyone is entitled to a decent home, a place where they can put down roots – the literal foundations needed to live a good and healthy life.

That is why we need to continue to accelerate action on housing at a regional level, and why we have set a clear mission statement to focus our work to 2040:

*Our ambition is to create safe and inclusive places to live that meet the needs of our residents.*

*We will do this by working with our partners to deliver sustainable and affordable homes in well-connected communities where people choose to live.*

***Ensuring that West Yorkshire is a place we are proud to call home.***

Success can be accelerated when we work together, with a shared vision, towards collective objectives like the ones set out in our first regional Housing Strategy for West Yorkshire. Our vision for housing in West Yorkshire is ambitious. We will create a region where people can move between home, work and recreation with ease. We are putting net-zero and sustainability at the heart of our work and making sure no one is left behind with equality, diversity and inclusion being at the forefront of our minds as we implement the strategy across the region.

We are realistic in our outlook – we know there are no quick fixes to the problems many people face when it comes to finding a safe, affordable and long-term home. But we won't let this hold us back, we will unite and accelerate the excellent work already being done by our five local authorities, and we will bring together public and private sector partners across the region to achieve our ambitions.

**Tracy Brabin – Mayor of West Yorkshire**

## Executive Summary

Everyone across West Yorkshire should have a safe and affordable home in a thriving community that is well-connected to places they need to access for employment, education, healthcare, recreation or other opportunities. The West Yorkshire Combined Authority brings together the local authorities of Bradford, Calderdale, Kirklees, Leeds and Wakefield. Within this document, our first **West Yorkshire Housing Strategy**, we shape our future journey to deliver on the housing needs of people and places across our region. Delivering the truly affordable homes and thriving, healthy communities that people need will help us to achieve the shared vision that we set out in our **West Yorkshire Plan** for a **prosperous, happy, well-connected, sustainable and safe** West Yorkshire. A place we are proud to call **home**.



## Our track record of delivery

Since our inception in 2014, we have developed a strong track record for delivery across the region. We have:

- As a region **delivered over 1,500 affordable homes in 2022/23** – the highest number of affordable housing completions in West Yorkshire since 2010.
- Established a landmark **Strategic Place Partnership** with Homes England. This identifies our priority areas for housing-led growth and regeneration with the capacity to deliver over 40,000 homes by 2040.
- Built a **strong network of social housing providers** through the [West Yorkshire Housing Partnership](#), who collectively provide a fifth of all homes across the region. The Partnership focuses on delivering more affordable homes, regenerating communities, combatting homelessness, advancing our low carbon ambitions and supporting health and prosperity through housing.
- Demonstrated our ability to deliver at pace through the **Brownfield Housing Fund, which will see 5,400 new homes developed** on underused brownfield land previously a blight on our communities.
- Invested in resource and capacity across all five West Yorkshire local authorities to support the development of housing projects that will help to **enable the delivery of over 22,000 homes** in the region.
- Supported the retrofitting of over **3,200 social homes to improve their energy efficiency**.

## The role of the Combined Authority

The devolution deal and the election of the first Mayor of West Yorkshire in May 2021 cemented a regional ambition for delivering sustainable and affordable housing. Nonetheless, the Combined Authority forms only one part of the housing system essential to deliver on our housing mission:

*Our ambition is to create safe and inclusive places to live that meet the needs of our residents.*

*We will do this by working with our partners to deliver sustainable and affordable homes in well-connected communities where people choose to live.*

***Ensuring that West Yorkshire is a place we are proud to call home.***

This West Yorkshire Housing Strategy articulates the **need and demand** for a good quality, truly affordable and adaptable housing offer across the region. Through this strategy, we outline the outcomes we collectively want to achieve across West Yorkshire and how we are going to get there. We recognise that as a public body, we cannot achieve our mission alone, but it is essential that we set a **strategic direction** for housing delivery and improvement across our region, so that our partners can work together to **deliver** for the people of West Yorkshire. We will **enable** this by collaborating with and convening partners to create networks of opportunity, using our tools, flexibilities and powers to support local authorities to deliver and unlock sites and systems where the market is not serving the needs of our people. We will leverage in additional funding to **invest** in homes for the future across West Yorkshire.

## Joining up our spatial ambitions

West Yorkshire is made up of a network of unique cities, towns and villages, all with their own identities and proud cultures which provide the foundations of great places to live. Together with our five local authorities, our spatial plans, partnerships and strategies collectively reflect our ambitions to tackle the climate emergency, achieve inclusive growth and deliver well-designed places. Our landmark **Strategic Place Partnership** with Homes England identifies priority areas across each local authority area within our region where housing-led regeneration can have a transformative impact, with capacity to deliver over 40,000 homes by 2040. Throughout our activity, we will continue to take a spatial approach to identify where co-ordinated public sector intervention, private sector investment and partner collaboration can deliver for places, people and communities across West Yorkshire.

## Our guiding principles

The Housing Strategy sets out two guiding principles, **sustainability** and **equality and inclusive growth**. These principles underpin and guide the steps we will take to achieve our objectives. We will weave these principles into our work with partners, our programmes and how we monitor and measure delivery against our objectives.

# Our objectives

We will achieve our housing mission by 2040 by focusing our activity on four core **objectives**. These have been developed in close collaboration with our partners and using a robust and in-depth regional evidence base on the housing challenges that West Yorkshire faces.

### Objective 1: Boosting the supply of the right homes in the right places

Delivering the number of homes at the scale our region needs is a significant challenge in the current economic and geo-political climate. Our work to date has helped to unlock delivery across our region and supported the recovery of house building after the COVID-19 pandemic, but levels of housing delivery are not even across our region. Some areas struggle to attract the housing investment they need due to low land values or the higher costs of making land ready to build housing on.

We need to work together to ensure that these places can realise their true potential as vibrant communities, and prioritise our delivery on brownfield land. Central to the work of the Combined Authority will be ensuring that new, existing and growing communities are better-connected, linking our investment in homes to investment in an improved transport network. Planning these together, will ensure that our residents have greater choice in where they live and how they access jobs and leisure activities, in turn improving residents' quality of life.

To boost the delivery of the right homes in the right places, we will need a range of providers to work with us. We will work to diversify the market by supporting both large housebuilders – who play a key role in delivering at scale across our region – as well as small and medium-sized enterprises (SMEs) and locally-driven interventions, such as community-led housing providers. This diverse network of providers will need robust and resilient supply chains, and a skilled workforce to deliver the homes we need for the future.

### Outcomes

To meet these challenges and deliver on **Objective 1: Boosting the supply of the right homes in the right places**, we will work towards the following outcomes:

- Deliver a robust pipeline of housing development opportunities aligned to well-connected places
- Support local authorities to deliver on housing need set out in local plans
- Improve the number of sustainable homes developed
- Increase in the number of homes delivered in Spatial Priority Areas

### Objective 2: Increasing the provision of truly affordable, accessible and adaptable homes

Through our work, we have sought to turbocharge the delivery of affordable homes, building strong networks with our social housing providers through the West Yorkshire Housing Partnership. In 2022-2023, we saw 1,536 affordable homes delivered, the highest number completed in a single year since 2010-11. Despite this positive progress, there are still not enough affordable homes in West Yorkshire to meet present and future demand.

There are nearly 85,000 households on housing waiting lists across West Yorkshire, and the acute housing need felt across the region creates a challenging environment for our local authority partners, with over 1,100 households in temporary accommodation. These issues are exacerbated by ever-increasing private rental costs – Leeds, for example, has seen rents increase by around 23% in the past five years alone.

These spiralling costs and the current economic climate are making home ownership increasingly unaffordable. There are additional challenges that we face in West Yorkshire, such as the high

relative cost of transport to access jobs and higher costs associated with heating our ageing and fuel-inefficient houses, which make it even more difficult for people to buy their first home.

Across our lives, the place we live plays a significant role in keeping us healthy and independent. We must ensure that our homes are adaptable to support the changing needs of an ageing population, as well as ensuring that we have an adequate supply of specialist or supported accommodation to meet the requirements of residents who need more from their housing.

### Outcomes

To meet these challenges and deliver on **Objective 2: Increasing the provision of truly affordable, accessible and adaptable homes**, we will work towards the following outcomes:

- Increased delivery of affordable housing across all local authority areas
- Improved access to the housing market for low-income households
- Support local authority partners to address housing need
- Increased support for local authorities tackling homelessness
- Increased levels of accessible and adaptable housing

### Objective 3: Improving the quality of our existing homes

Decent quality, sustainable and energy efficient homes are an essential ingredient for the health, well-being and zero-carbon future of the region. However, in many areas of West Yorkshire, homes are older, less energy-efficient and poorer quality than the national average. This leads to high energy bills and compounds fuel poverty across the region. That is why we are working at pace to develop our Better Homes Hub and are investing heavily in decarbonising social homes across the region to support everyone in West Yorkshire to live in a warm, comfortable and low-carbon home.

Poor quality housing can also have a significant detrimental impact on health, and official estimates indicate that one in every five homes across West Yorkshire does not meet the statutory minimum safety standards for housing or may be in a state of disrepair. The condition of homes in the private rented sector, which now houses 20% of West Yorkshire residents, is a particular cause for concern. An estimated two in every five privately rented homes across West Yorkshire fail to provide decent quality accommodation to residents. This not only impacts individual households – it costs the national economy and the NHS an estimated £18.5 billion per year. We urgently need Government to give us the powers and resources to join up the work of housing and health colleagues, as well as the long-term, sustainable investment needed to deliver decent, climate resilient homes that are fit for the future.

### Outcomes

To meet these challenges and deliver on **Objective 3: Improving the quality of our existing homes**, we will focus on the following outcomes:

- Work towards eliminating non-decent homes across West Yorkshire
- Improve the quality of homes in the private rented sector
- Increase the number of low carbon homes to work towards our net-zero targets by 2038
- Reduce the proportion of households in fuel poverty
- Reduce the incidence of health issues related to housing quality



### Objective 4: Creating resilient places that support the well-being of our residents

West Yorkshire is made up of diverse, dynamic and flourishing communities, yet the distribution of health, wealth and opportunity is not even across the region. A high-quality housing offer can have transformative impacts on places and communities, but we must also work to ensure that our physical, digital and community infrastructure are robust, and that our neighbourhoods are great places to live and play, where people can safely walk, wheel and cycle. We will build on the strengths of our existing places, ensuring that our homes and communities play their vital role in supporting the health, safety and happiness of West Yorkshire residents.

In some places, residents have limited access to green space, and we know this issue disproportionately impacts people from ethnic minority communities. Parks are essential community assets, and play an important role in allowing residents to come together and exercise. Despite this, women and girls are not always able to easily and safely access parks in West Yorkshire, and so we must work to ensure the safety of women and girls across our communities. Access to outdoor space is also essential for the well-being of children, but many do not have access to safe places for play. We will ensure that our work is targeted to address these inequalities.

Great places also require robust infrastructure. We want walking, wheeling and cycling to be the natural choice for short journeys, and for all places to be well-connected by public transport infrastructure so that residents can easily access opportunities. Right now, there is heavy reliance on car use in the region and cycle trips represent only around 0.2% of journeys made by West Yorkshire residents, much lower than the 2% average across England. To succeed, great places require local amenities and community infrastructure, as well as good digital connectivity, including high speed broadband. We will work with partners to create sustainable places that meet the needs of existing, growing and future communities.

We must also ensure that our infrastructure is resilient to meet the demands of our changing climate. Around 3% of properties in West Yorkshire are situated within a flood zone. That is why we are investing up to £22 million to reduce flood risk across the region, backing an ambitious programme to safeguard our communities and businesses.

#### Outcomes

To meet these challenges and deliver on **Objective 4: Creating resilient places that support the well-being of our residents**, we will work towards the following outcomes:

- Improved neighbourhood safety and health through improvements in quality of place
- Support for developments with access to green space and space to play
- Support for developments that facilitate active travel
- Improved infrastructure resilience

## Introduction

West Yorkshire is home to over 2.35 million people, comprising nearly a million households. All our cities and towns have distinctive strengths built from their communities, heritage, character, industries and cultural assets. Collectively, these places provide the homes, communities and opportunities for employment and recreation upon which our residents build their lives.

Housing is a key contributor to health and well-being, economic activity and quality of life across the region. The sufficient supply of adaptable, good quality, affordable housing is essential to securing the prosperity of our region. This document is the first regional Housing Strategy adopted across West Yorkshire, and establishes our housing mission to 2040:



*Our ambition is to create safe and inclusive places to live that meet the needs of our residents.*

*We will do this by working with our partners to deliver sustainable and affordable homes in well-connected communities where people choose to live.*

***Ensuring that West Yorkshire is a place we are proud to call home.***

We will work to achieve this mission through four core objectives:

**Objective 1: Boosting the supply of the right homes in the right places.**

**Objective 2: Increasing the provision of truly affordable, accessible and adaptable homes.**

**Objective 3: Improving the quality of our existing homes.**

**Objective 4: Creating resilient places that support the well-being of our residents.**

Our work towards each of our objectives is underpinned by two guiding principles: [sustainability](#) and [equality and inclusive growth](#). Each objective within the strategy is divided into two parts. The first, **rationale**, brings together the evidence base we have built on the challenges our region faces within the scope of that objective. The second part of each objective uses this evidence base to establish **outcomes** that we will work towards, setting out in broad terms what we would like to achieve through our activity and that of our partners. We will also develop a set of [measures](#) to keep us on track to achieve our objectives by 2040.

## The role of the West Yorkshire Combined Authority

The West Yorkshire Combined Authority brings together the local authorities of Bradford, Calderdale, Kirklees, Leeds and Wakefield. Since its inception in 2014, the Combined Authority has developed and implemented programmes of support and investment in housing across the region, including the Local Growth Fund and more recently the Brownfield Housing Fund, and has engaged actively with the private sector and local authorities to accelerate housing delivery.

Our initial policy position was established in the Leeds City Region Housing and Regeneration Strategy 2014 and was built on in the Leeds City Region Housing Vision 2019. Since the Housing Vision was established, the Combined Authority has seen significant changes, including securing the 2020 devolution deal and electing the first Mayor of West Yorkshire, as well as national policy and market shifts that have had a huge impact on our operating environment.

In addition, the Mayor and five West Yorkshire local authority leaders launched the [West Yorkshire Plan 2040](#) in June 2023. The West Yorkshire Plan sets out the collective ambitions of the Combined Authority and local authorities across five missions that, together, aim to achieve the vision for ‘a brighter West Yorkshire’.

The West Yorkshire Housing Strategy presents a regional trajectory to 2040, which enables and adds value to the work of our five local authority partners, and links to our wider focus on inclusive growth, sustainability, equality, diversity and inclusion.

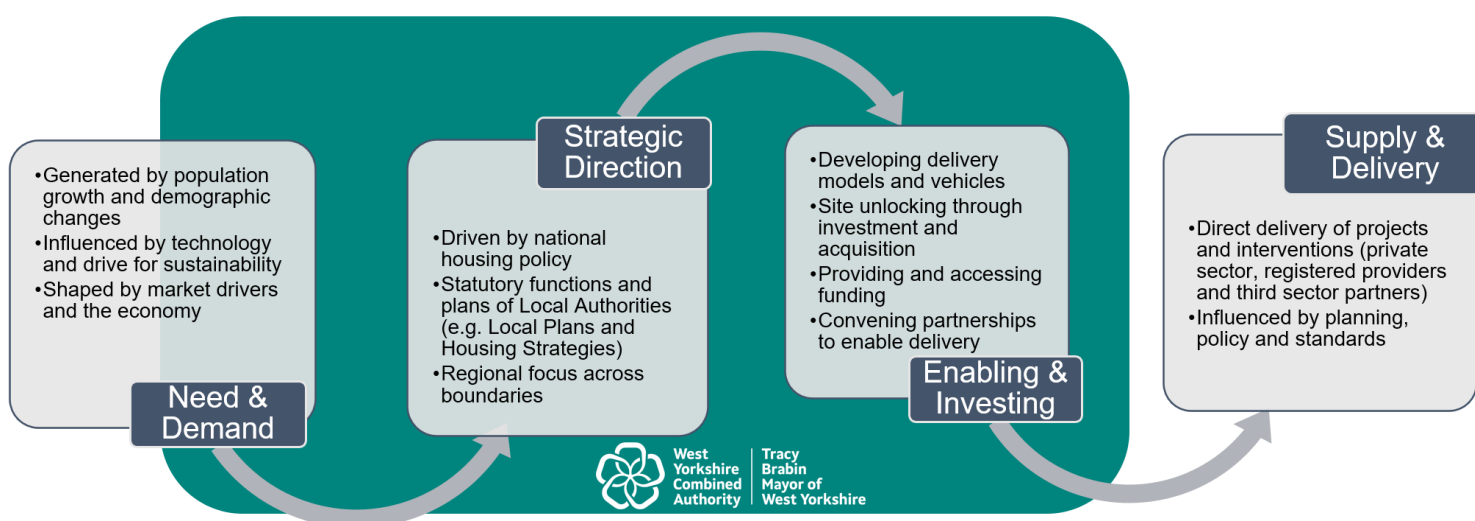
### Our impact to date

We have developed a strong track record for delivery across the region. Through our work to-date, we have:

- As a region **delivered over 1,500 affordable homes in 2022/23** – the highest number of affordable housing completions in West Yorkshire since 2010.
- Established a landmark **Strategic Place Partnership** with Homes England. This identifies our priority areas for housing-led growth and regeneration with the capacity to deliver over 40,000 homes by 2040.
- Built a **strong network of social housing providers** through the [West Yorkshire Housing Partnership](#), who collectively provide a fifth of all homes across the region. The Partnership focuses on delivering more affordable homes, regenerating communities, combatting homelessness, advancing our low carbon ambitions and supporting health and prosperity through housing.
- Demonstrated our ability to deliver at pace through the **Brownfield Housing Fund that will see 5,400 new homes developed** on underused brownfield land previously a blight on our communities.
- Invested in resource and capacity across all five West Yorkshire local authorities to support the development of housing projects that will help **enable the delivery of over 22,000 homes** in the region.
- Supported the retrofitting of over **3,200 social homes to improve their energy efficiency**.

### Our future role

The devolution deal and the election of the first Mayor of West Yorkshire in May 2021 cemented a regional ambition for delivering sustainable and affordable housing. Nonetheless, the Combined Authority forms only one part of the housing system essential to deliver on this ambition.



This West Yorkshire Housing Strategy articulates the **need and demand** for a good quality, truly affordable and adaptable housing offer across the region. Through this strategy, we outline at a



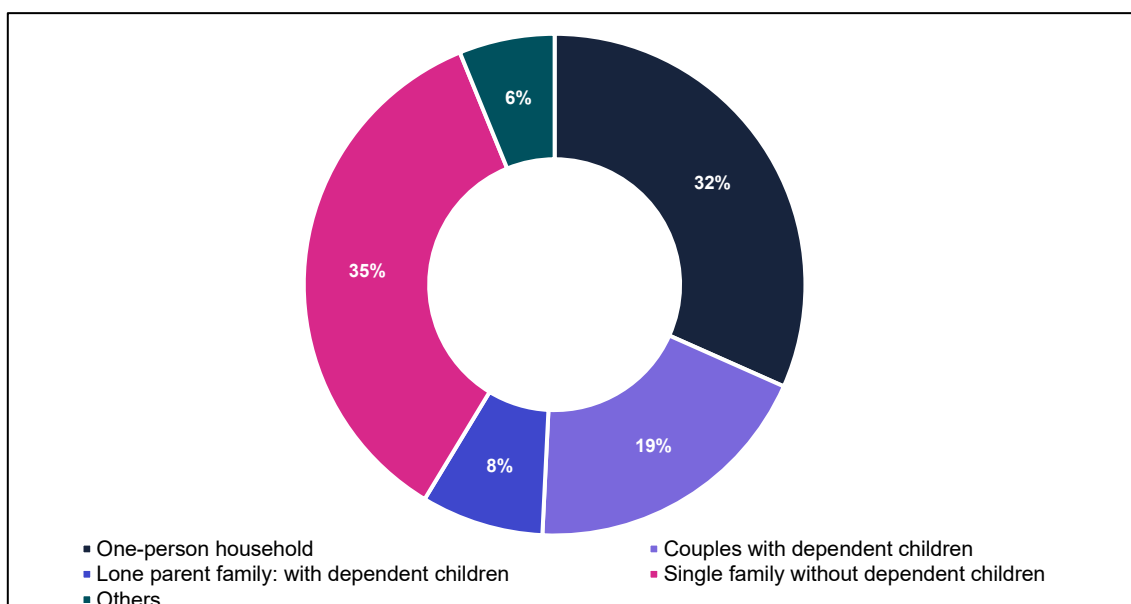
Combined Authority level the outcomes we collectively want to achieve across West Yorkshire and our actions and plans to get there. We recognise that as a public body, we cannot achieve our mission alone, but it is essential that we set a **strategic direction** for housing delivery and improvement across our region, so that our partners can work together to **deliver** for the people of West Yorkshire. We will **enable** this by collaborating with and convening partners to create networks of opportunity, using our tools, flexibilities and powers to support local authorities to deliver and unlock sites and systems where the market is not serving the needs of our people. We will leverage in additional funding to **invest** in homes for the future across West Yorkshire.

The Combined Authority will continue to develop its understanding of what is needed across all of our diverse communities to improve the quality of new and existing homes and meet our net-zero carbon ambitions. We will report on our performance against our objectives in a transparent manner using clear performance measures, which we have started to outline in [Appendix 2](#). We will demonstrate, to central government and other stakeholders, the scale of housing delivery and improvement potential across West Yorkshire through our activity. Based on our track record of strong regional delivery, we will continue to make a bold case for increased devolution and funding flexibilities tailored to local needs.

## Housing in West Yorkshire in 2024

### Population trends

The population of West Yorkshire increased by over 125,000 between 2011 and 2021, representing a 5.6% increase.<sup>1</sup> Despite having a higher proportion of young people than England as a whole, in line with national trends, West Yorkshire has an ageing population. During the same period, the population aged 65 and over grew by nearly 19%.<sup>2</sup> The 2021 Census recorded just under 1 in 5 households as couples with dependent children and around 8% of households as lone parents with dependent children.<sup>3</sup> Population growth dictates the supply, type, and tenure of new homes we need as a region, forming the basis on which our strategy has been developed.



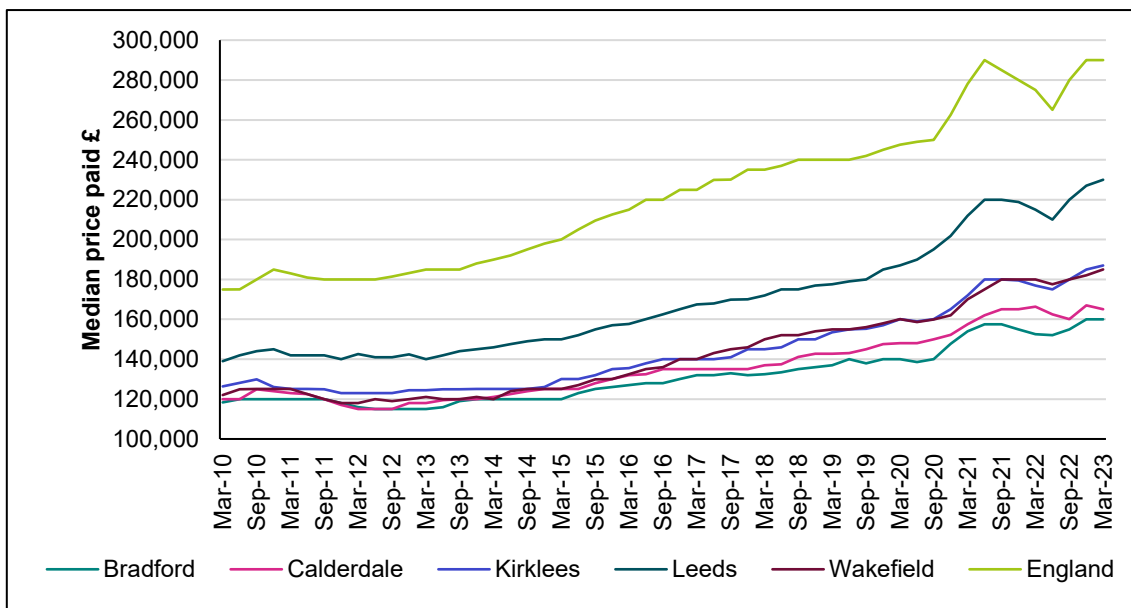
**Figure 1 Household Composition - West Yorkshire**  
Source: Census 2021

### Housing market trends

Across West Yorkshire, there are 972,900 households, an increase of 50,400 (5%) between 2011 and 2021.<sup>4</sup> In terms of the type of home these households occupy, 83% of dwellings are houses, with an additional 13% of the housing stock consisting of purpose-built flats or tenements.<sup>5</sup>

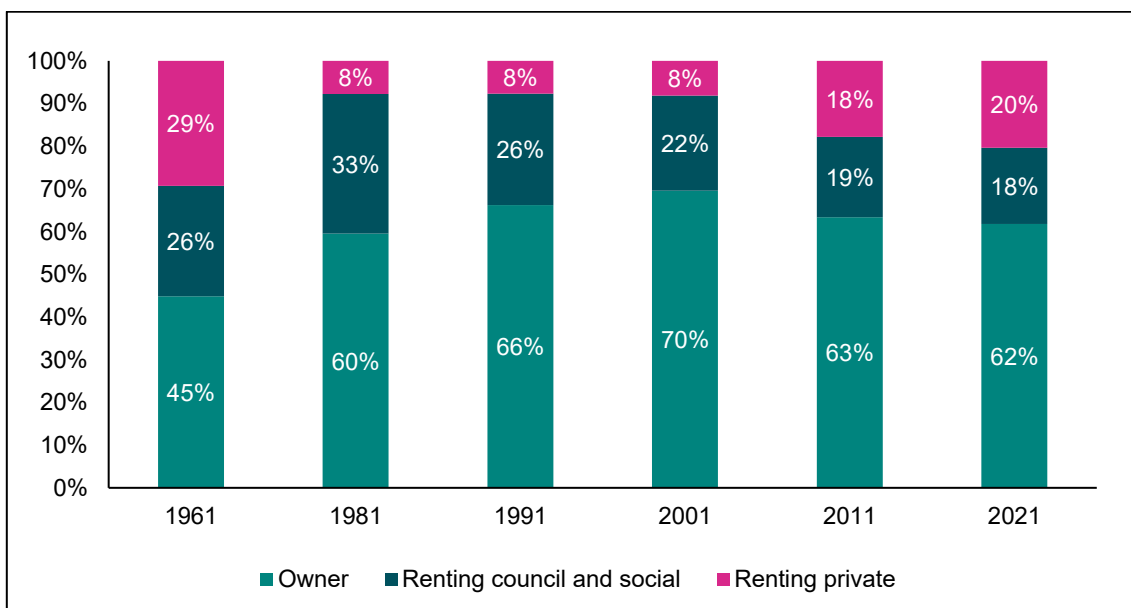
The latest available data reveals that the median regional house price was £190,000 for the year ending March 2023. Between March 2022 and 2023, the median house price in England increased

by 5.5%, whilst the median house price in West Yorkshire increased by 4.1%. Over the 15 years between March 2008 and March 2023, median house prices across West Yorkshire have increased by 40.7%, which is lower than the national average (55%).<sup>6</sup> These regional differences in price growth do not, however, mean that housing is necessarily more affordable in West Yorkshire because of wider cost-of-living and affordability pressures that impact our region disproportionately.



**Figure 2 Median House Prices - 2010 - 2023**  
Source: ONS House Price Statistics for Small Areas

Levels of renting and home ownership have also changed significantly over time across our region. In line with national trends, home ownership rose significantly in the period up to the 2008 Global Financial Crisis, largely driven by the increased availability of mortgage lending and the significant impact of the Right to Buy scheme. These measures have led to the transfer of social housing into the owner-occupier and private rental sectors. One of the most notable developments across our region, again in line with national trends, is the growth of the private rented sector. The relative size of the private rented and owner-occupier sectors in West Yorkshire align with national trends, with social rented homes similarly continuing to reduce as a proportion of our region’s housing stock. The private rented sector now plays a significant role in providing homes for residents of West Yorkshire, with more than 1 in 5 of our residents now occupying a privately rented home.



**Figure 3 Tenure - Households (West Yorkshire)**  
Source: Census data, NOMIS

### Operating environment changes

Our local authority partners have experienced significant changes in their operating environment in recent years. They have worked hard to manage substantial funding reductions since 2010-11, and during that time have continued to deliver their crucial statutory functions, such as planning services, adult social care, highway maintenance and waste collection, whilst facing a range of new demand and cost pressures.<sup>7</sup> Across West Yorkshire, local authorities have on average seen their funding settlement from central government reduced by 40% since 2015.<sup>8</sup> Data from the National Audit Office suggests that planning and housing functions within local government have seen some of the most substantial falls in spending, with significant impacts on funding for welfare services, homelessness administration and prevention, temporary accommodation, as well as enforcement and investment to improve the private rented sector.<sup>9</sup>

# Joining up our spatial ambitions

Our spatial plans, partnerships and strategies collectively reflect our ambitions to tackle the climate emergency, achieve inclusive growth and deliver well-designed places. We support this growth through investment and acceleration across an active portfolio of strategic sites. **Spatial Priority Areas**, shaded purple on the map below, represent the largest or most strategic development opportunities within our region. In these areas, co-ordinated public sector intervention alongside private sector investment has transformational potential. Building on these Spatial Priority Areas, our **Strategic Place Partnership** with Homes England identifies focus areas (hatched in green on the map below) where investment has the potential to turbo charge housing growth. When combined, these spatial approaches show where joined up partner collaboration and coordination will deliver on our regional ambitions.

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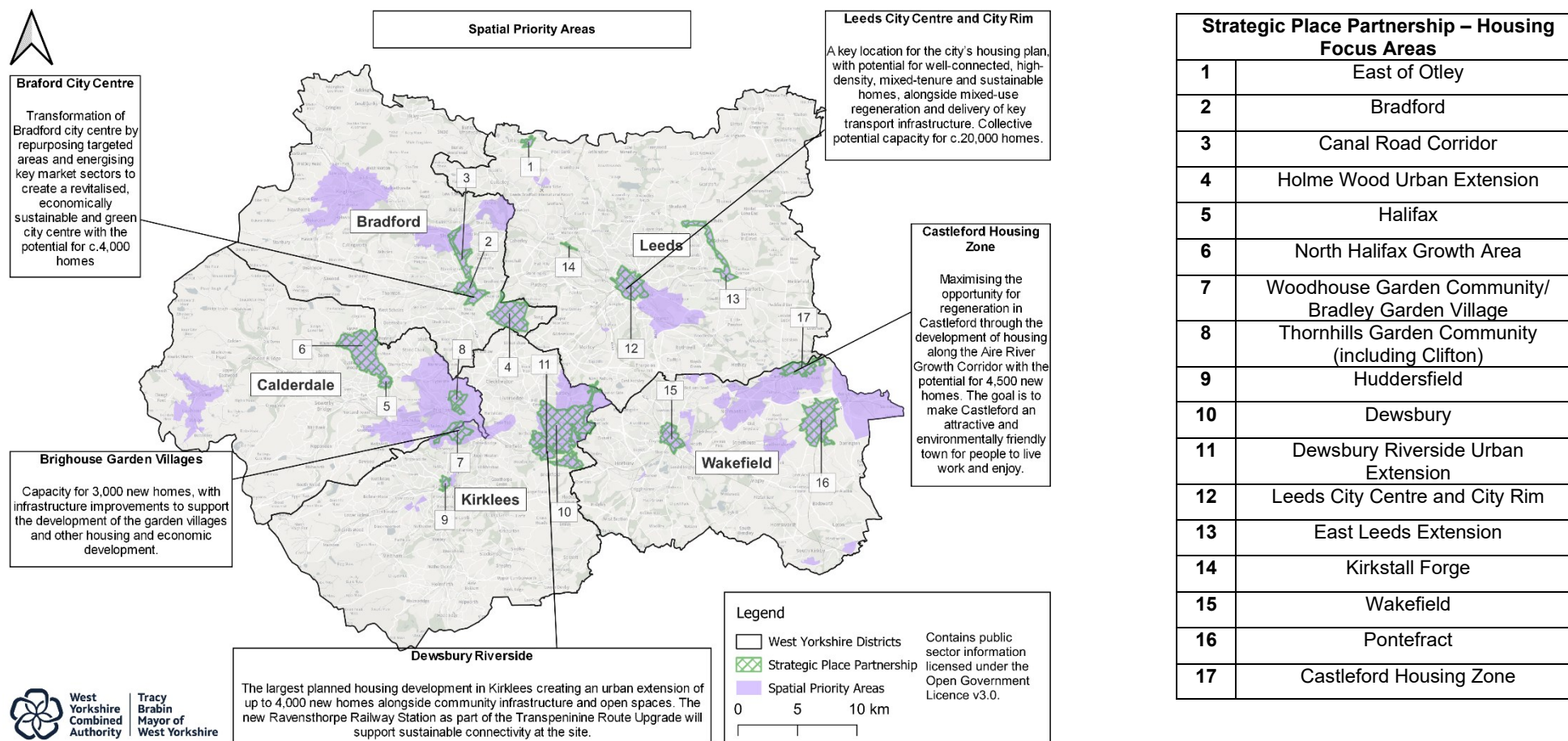


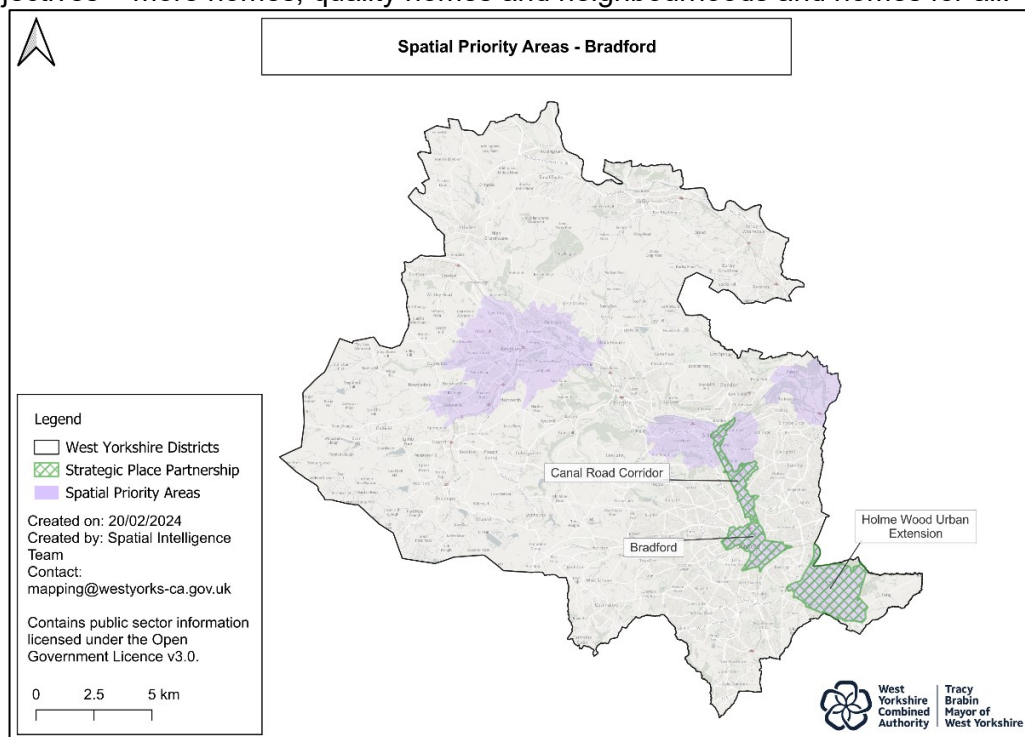
Figure 4 Spatial Priority Areas - West Yorkshire

# Bradford

The [Bradford Housing Strategy](#) 2020-2030 sets out a vision that ‘everyone in Bradford District should have a place to call home which meets their needs and in which they can thrive’. The strategy sets out three core objectives – more homes, quality homes and neighbourhoods and homes for all.

## Key statistics:

<b>Population</b>	<b>552,644</b>
<b>Economically active (% of population)</b>	<b>73%</b>
<b>Projected population growth (2018-2043)</b>	<b>5.5%</b>
<b>Projected household growth (2018-2043)</b>	<b>11.9%</b>
<b>Annual average housing need identified in local plan</b>	<b>1,704*</b>
<b>Homes delivered in last 3 years</b>	<b>2,944</b>
<b>Affordable homes delivered in last 3 years</b>	<b>442</b>
<b>Housing delivery test 2022</b>	<b>67%</b>
<b>Households on housing waiting list</b>	<b>17,285</b>
<b>Median house price</b>	<b>£160,000</b>
<b>Median private rented sector rent (3 bed) per month</b>	<b>£575</b>
<b>Homes with EPC C or above (estimate)</b>	<b>33.4%</b>
<b>Percentage of population with easy access to green space</b>	<b>25%</b>
<b>Percentage of residential properties in flood zones</b>	<b>2%</b>



## Strategic Place Partnership focus areas:

**Bradford City Centre** will see the creation of 3,500 new homes on new and existing sites:

- (1) Bradford City Village – c.1,000 homes – repurposing former retail and trading sites in the heart of the city centre to create a green, healthy and sustainable city village.
- (2) Forster Square, Little Germany and Cathedral Quarter (FLC) – c. 1,400 homes – large scale mixed-use development opportunity.
- (3) Southern Gateway – c.2,500 homes – maximising investment in strategic infrastructure to unlock development.

**New Bolton Woods** – c.1,200 homes – part of the Canal Road Corridor, bring together two of Bradford’s largest housing development opportunities.

**Holme Wood Urban Extension** – c.1,700 homes – creating a sustainable community through the regeneration of existing urban areas.

\* Figure does not include the 35% urban uplift.

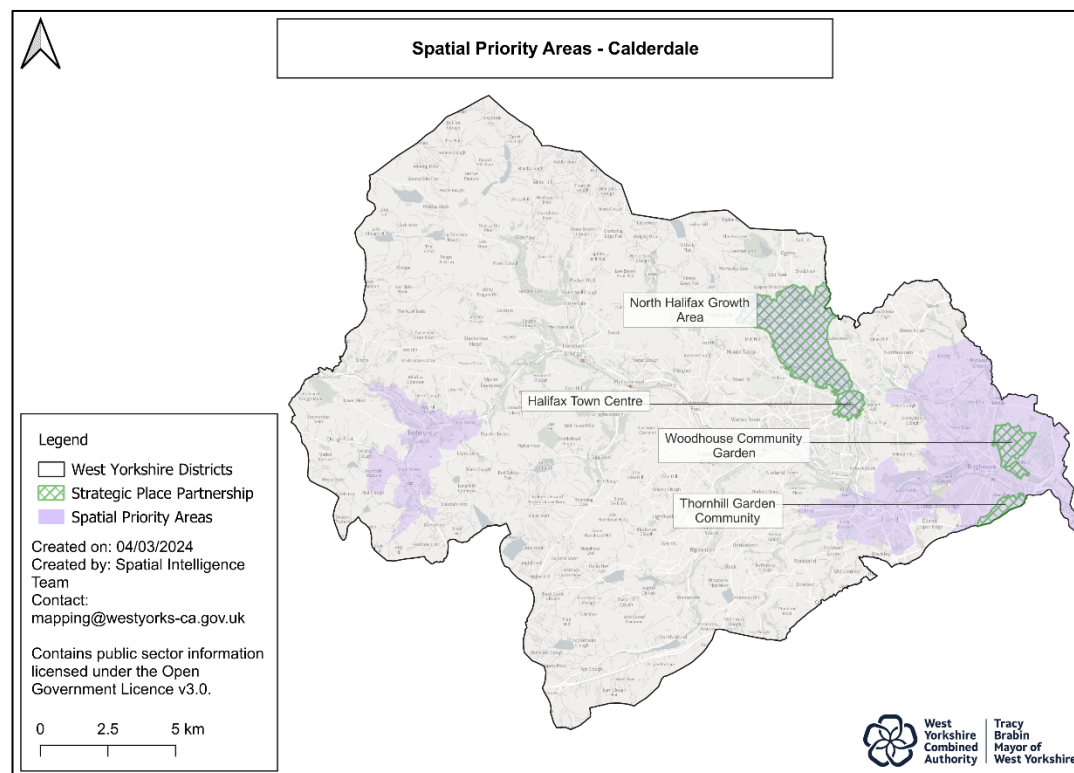


## Calderdale

The [Calderdale Housing Strategy](#) 2021-2026 draws upon the 2024 vision ‘for a place where you can realise your potential whoever you are, whether your voice has been heard or unheard in the past.’ The strategy centres around three priority themes – improving quality of place, quality of homes and quality of life.

### Key statistics:

<b>Population</b>	<b>207,699</b>
<b>Economically active (% of population)</b>	<b>78%</b>
<b>Projected population growth (2018-2043)</b>	<b>3.6%</b>
<b>Projected household growth (2018-2043)</b>	<b>10.5%</b>
<b>Annual average housing need identified in local plan</b>	<b>997</b>
<b>Homes delivered in last 3 years</b>	<b>1,011</b>
<b>Affordable homes delivered in last 3 years</b>	<b>238</b>
<b>Housing delivery test 2022</b>	<b>49%</b>
<b>Households on housing waiting list</b>	<b>7,486</b>
<b>Median house price</b>	<b>£165,000</b>
<b>Median private rented sector rent (3 bed) per month</b>	<b>£550</b>
<b>Homes with EPC C or above (estimate)</b>	<b>32.9%</b>
<b>Percentage of population with easy access to green space</b>	<b>20%</b>
<b>Percentage of residential properties in flood zones</b>	<b>5.9%</b>



### Strategic Place Partnership focus areas:

**Brighouse Garden Communities (Thornhills and Woodhouse)** – c.3,000 homes – opportunity for sustainable development with enhanced local facilities and infrastructure (aligned to the Bradley Park development).

**Halifax Town Centre** – c.300 homes – reuse and revitalisation of the town centre living offer bringing brownfield land into use to support residential development.

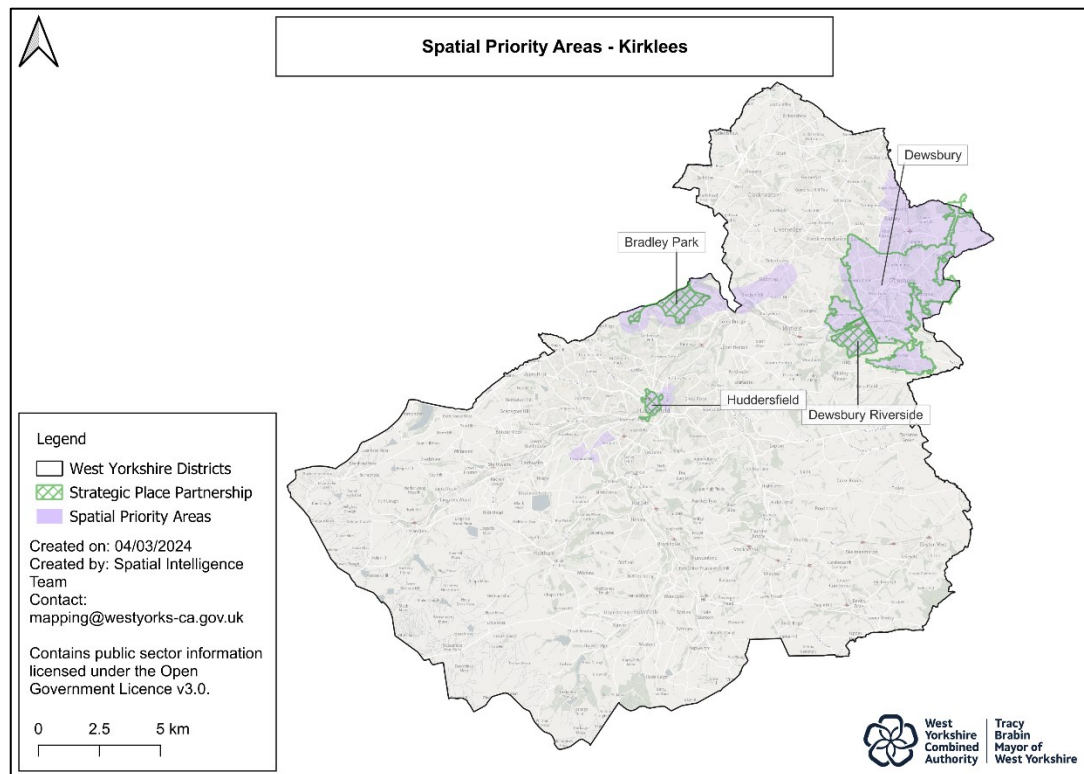
**North Halifax Growth Zone** – c.1,600 homes – creating opportunities for economic investment in the area to increase resilience and provide inclusive growth benefits for residents.

## Kirklees

The most recent [Kirklees Housing Strategy](#) sets out a vision for housing and housing services in the district, focusing on enhancing people’s lives and investing to strengthen communities. The strategy sets out three priorities for housing in Kirklees – to meet the housing needs of vulnerable people, improve housing quality and make the best use of stock, and enable long-term housing growth in terms of both market and affordable homes.

### Key statistics:

<b>Population</b>	<b>437,593</b>
<b>Economically active (% of population)</b>	<b>77%</b>
<b>Projected population growth (2018-2043)</b>	<b>5.8%</b>
<b>Projected household growth (2018-2043)</b>	<b>11.2%</b>
<b>Annual average housing need identified in local plan</b>	<b>1,730</b>
<b>Homes delivered in last 3 years</b>	<b>2,878</b>
<b>Affordable homes delivered in last 3 years</b>	<b>335</b>
<b>Housing delivery test 2022</b>	<b>67%</b>
<b>Households on housing waiting list</b>	<b>13,267</b>
<b>Median house price</b>	<b>£187,000</b>
<b>Median private rented sector rent (3 bed) per month</b>	<b>£595</b>
<b>Homes with EPC C or above (estimate)</b>	<b>38.2%</b>
<b>Percentage of population with easy access to green space</b>	<b>15%</b>
<b>Percentage of residential properties in flood zones</b>	<b>3.5%</b>



### Strategic Place Partnership focus areas:

**Bradley Park** – c.2,000 – large sustainable development opportunity, largely in council ownership, benefitting from good infrastructure and the development of local facilities.

**Dewsbury Riverside** – c.4,000 homes – urban extension to the south of Dewsbury creating new local amenity and highway infrastructure maximising the benefits of the Transpennine Route Upgrade and new Ravensthorpe station.

**Dewsbury Town Centre** – c.1,400 homes – reuse of existing building and land in the town centre, focused initially on the Daisy Hill area to revitalise the town, realising the Dewsbury Blueprint.

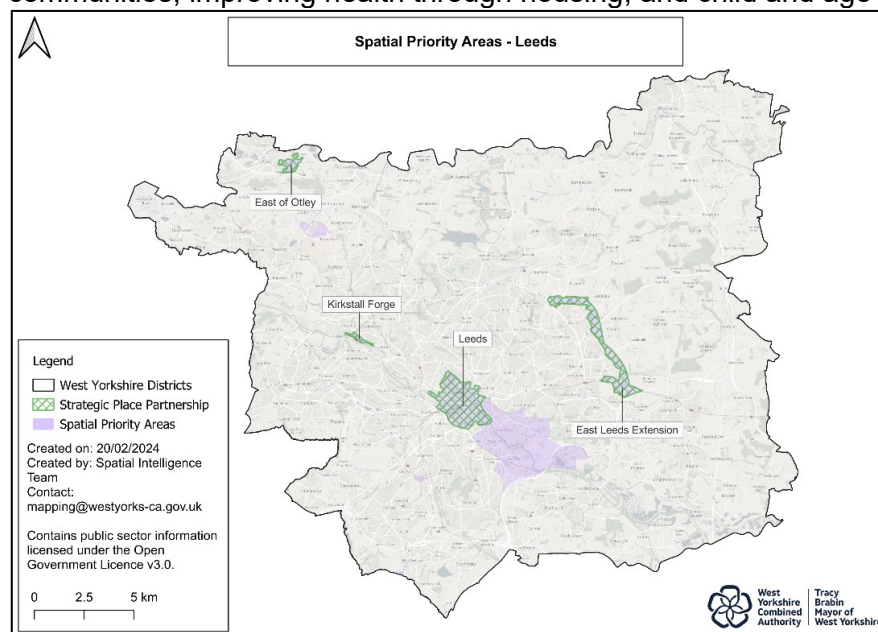
**Huddersfield Town Centre** – maximising the residential offer of the town centre through the realisation of the Huddersfield Blueprint, enhancing the character of the town and regenerating key heritage assets.

## Leeds

The [Leeds Housing Strategy](#) 2022-2027 sets its aim as ‘meeting the city’s housing needs and providing high quality affordable homes in thriving and inclusive communities, with appropriate support for those who need it’. It articulates six priority themes – meeting affordable housing need, improving housing quality, reducing homelessness and rough sleeping, thriving and inclusive communities, improving health through housing, and child and age-friendly housing.

### Key statistics:

<b>Population</b>	<b>822,483</b>
<b>Economically active (% of population)</b>	<b>80%</b>
<b>Projected population growth (2018-2043)</b>	<b>6.7%</b>
<b>Projected household growth (2018-2043)</b>	<b>8.1%</b>
<b>Annual average housing need identified in local plan</b>	<b>3,247*</b>
<b>Homes delivered in last 3 years</b>	<b>9,715</b>
<b>Affordable homes delivered in last 3 years</b>	<b>1,817</b>
<b>Housing delivery test 2022</b>	<b>134%</b>
<b>Households on housing waiting list</b>	<b>20,283</b>
<b>Median house price</b>	<b>£230,000</b>
<b>Median private rented sector rent (3 bed) per month</b>	<b>£825</b>
<b>Homes with EPC C or above (estimate)</b>	<b>41.1%</b>
<b>Percentage of population with easy access to green space</b>	<b>28%</b>
<b>Percentage of residential properties in flood zones</b>	<b>3.7%</b>



### Strategic Place Partnership focus areas:

**Leeds City Centre and City Rim** – capitalising the housing offer in the city centre and city rim:

- (1) South Bank/ Eastside/ Holbeck – c.6,000 homes – delivery of the South Bank Regeneration Framework and opportunities extending to Holbeck and Eastside.
- (2) Westend River Side – c.2,000 homes – connecting housing development to growing economic and employment opportunities in the city.
- (3) Innovation Arc – c.3,000 homes – maximising underused brownfield land and the West Yorkshire Investment Zone opportunity.
- (4) Mabgate – c.2,000 homes – linking existing and new communities to city centre economic opportunity.

**East of Otley** – c.550 homes – opportunity to unlock homes in north Leeds through delivery of infrastructure.

**Kirkstall Forge** – c.1,000 homes – mixed-use development and a key regeneration area for Leeds, maximising the economic benefit of the new Kirkstall Forge station.

**East Leeds Extension** – c.4,000 homes – unlocked through delivery of the East Leeds Orbital Route (ELOR), the scheme is now in delivery with work ongoing to develop infrastructure required to create a sustainable community.

\* Figure does not include the 35% urban uplift.

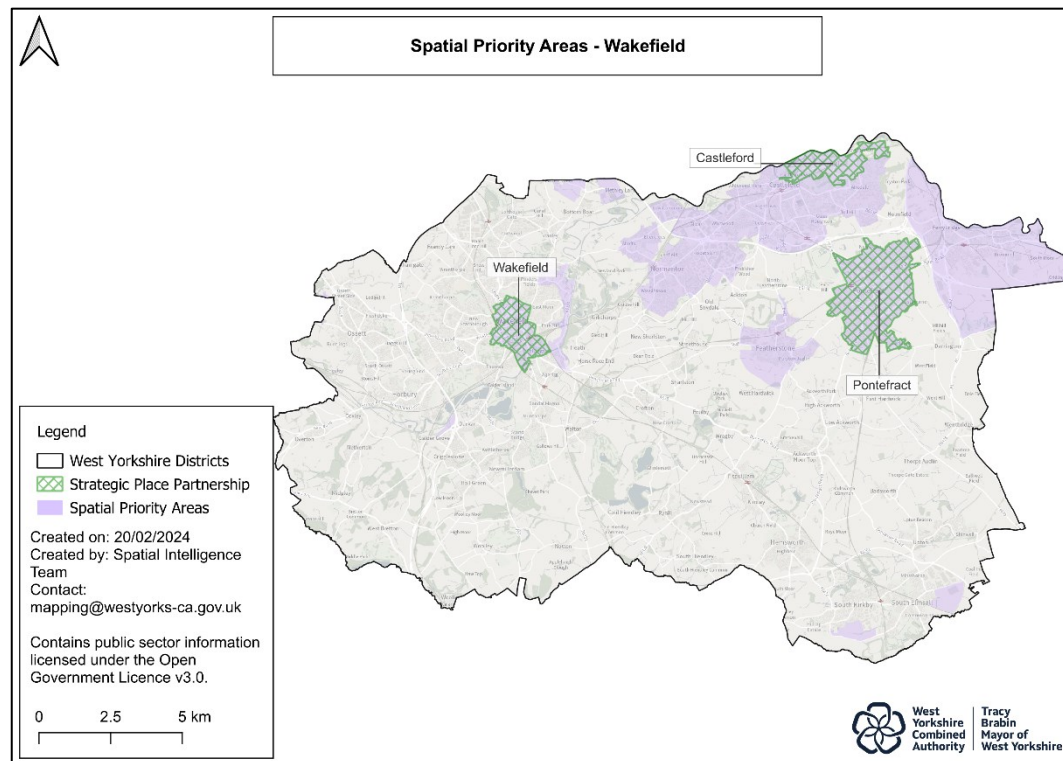


## Wakefield

The [Wakefield Housing Plan](#) 2023-2026 sets out a vision for Wakefield to have a robust housing offer that promotes regeneration and economic growth. The plan sets out twelve priorities for delivery captured under three key themes: more homes – high quality housing growth; better homes – safe and healthy homes that meet local need; and sustainable communities – resilient people and sustainable housing.

### Key statistics:

<b>Population</b>	<b>357,729</b>
<b>Economically active (% of population)</b>	<b>77%</b>
<b>Projected population growth (2018-2043)</b>	<b>21.4%</b>
<b>Projected household growth (2018-2043)</b>	<b>25%</b>
<b>Annual average housing need identified in local plan</b>	<b>1,400</b>
<b>Homes delivered in last 3 years</b>	<b>4,482</b>
<b>Affordable homes delivered in last 3 years</b>	<b>841</b>
<b>Housing delivery test 2022</b>	<b>180%</b>
<b>Households on housing waiting list</b>	<b>25,703</b>
<b>Median house price</b>	<b>£185,000</b>
<b>Median private rented sector rent (3 bed) per month</b>	<b>£625</b>
<b>Homes with EPC C or above (estimate)</b>	<b>40.7%</b>
<b>Percentage of population with easy access to green space</b>	<b>15%</b>
<b>Percentage of residential properties in flood zones</b>	<b>3.3%</b>



### Strategic Place Partnership focus areas:

**Castleford Growth Zone** – c. 3,000 homes – realisation of the Aire River Growth Corridor Masterplan with investment in new infrastructure and active travel opportunities along the corridor.

**Pontefract Masterplan** – one of Wakefield’s five towns – supporting the development of Pontefract including investment in the Grade II listed Pontefract Dispensary site with c.100 homes.

**Wakefield City Centre** – an opportunity for mixed-use development and enhancement of the character of the city, building on existing investments in and around the city such as City Fields.

# Guiding Principles

## Sustainability

We are committed to creating and growing sustainable and well-connected neighbourhoods across West Yorkshire to contribute to our [net-zero carbon ambitions](#). Each objective within the strategy aims to support action on the climate emergency and create opportunities to deliver on our net-zero carbon plans. This includes initiatives to enhance energy efficiency in homes and promote domestic transition to renewable energy sources.

We want to develop an integrated public transport network, linking our housing activity to our vision to make healthy and sustainable travel around West Yorkshire [easy and reliable](#), so that residents can make more trips by bus and rail across our region. Housing also plays an important role in facilitating active travel, including walking, wheeling and cycling. Through our work we will promote and encourage the development of active travel infrastructure to enable safe and environmentally-friendly transport use, connecting housing to the wider system of places for education, employment and recreation.

Sustainability, in this context, extends beyond our net-zero carbon ambitions and includes the creation of resilient, safe and adaptable communities that are able to withstand the challenges of our changing climate.

## Equality and inclusive growth

Through each of the strategy's objectives, we aim to support individuals and communities that face systemic barriers to accessing a safe and stable home. This includes communities facing deprivation, inequality, poor health and wider forms of exclusion. Through our work, we will seek to understand the diverse housing experiences of those with protected characteristics, as well as other marginalised and minority groups across our region.

We want to enable as many people as possible, from all our diverse communities, to contribute to and benefit from our interventions to improve access to and the quality of homes and communities across the region. We will work to monitor how the implementation of our strategy affects communities that may face multiple exclusion and disadvantage, and the extent to which our work under this strategy supports inclusive growth across the region.

# Objective 1: Boosting the supply of the right homes in the right places

West Yorkshire is central to rebuilding and rebalancing the national economy, enabling the North of England to fully contribute to and benefit from economic growth and prosperity. A core element of ensuring West Yorkshire plays its critical role in the national economy is the development of good quality homes in well-connected neighbourhoods where people want to live. Mission One and Mission Two of our [West Yorkshire Plan](#) set out our commitment to building well-connected places that create happy and active communities. Through our work to develop a new regional Economic Strategy, we recognise the vital role that housing plays in creating places where people can thrive. However, levels of development are not even across the region. While in some places, housebuilding has been strong, in other places it has stagnated, often due to low land values, poor connectivity and outdated infrastructure. We have an ambition through this strategy to level the field, ensuring we don't just build homes, but create places and communities we are proud to call home.

## What we are doing now

We are working with partners such as Homes England, West Yorkshire Housing Partnership and developers to deliver on our Strategic Place Partnership, accelerating development through our **£3.2 million Housing Accelerator Fund** and prioritising delivery on brownfield sites through our **£89 million Brownfield Housing Fund**.

## Rationale

### The homes we need

Collectively, West Yorkshire needs to build more than 9,000 homes on average per year to meet the housing requirements of its growing population. In 2018/19, West Yorkshire delivered 9,262 homes – the highest number of homes completed in a single year over the last 10 years. As with most parts of the country, the COVID-19 pandemic, Brexit, global conflicts and cost-of-living crises have contributed to a slowdown in overall delivery. Despite an improvement in housing delivery in 2021/22, the number of homes we started to build have seen an overall slowdown in 2022/23, predominantly due to rising costs and a challenging operating environment.

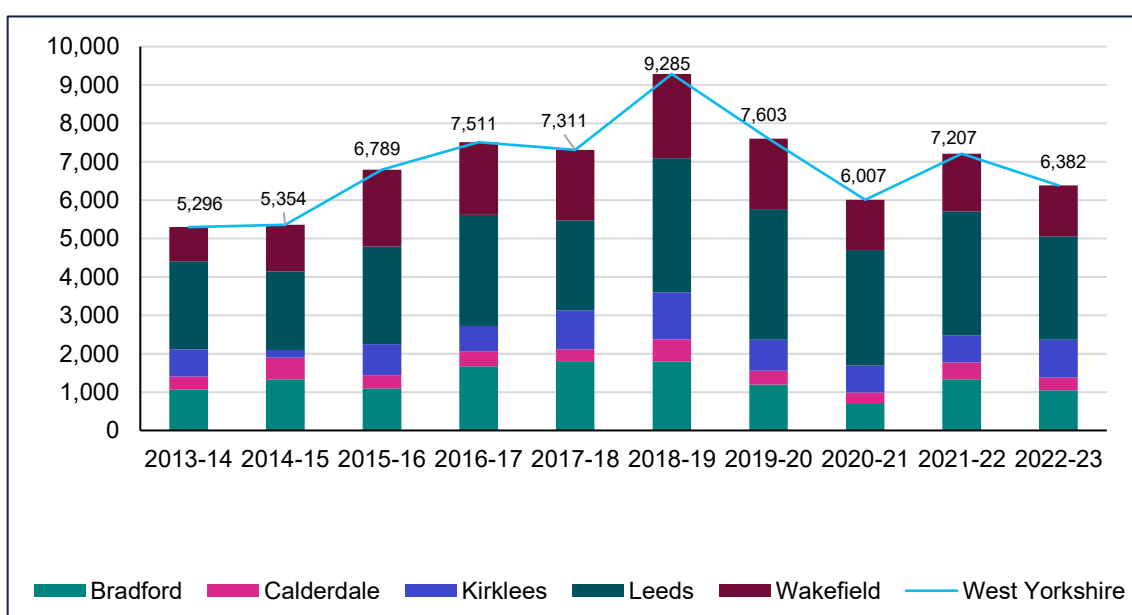


Figure 5 Net Additional Dwellings by Local Authority Area (2013/14 - 2022/23) - West Yorkshire  
Source: DLUHC Live Tables

However, these changes have not been felt across all parts of West Yorkshire. Development tends to occur more frequently in the North and East of the region due to stronger markets and higher land

values. These factors make development more viable in these areas, often leading to greater profits. This has left many communities behind, particularly in those areas where development is challenging, often because lower land values are compounded by higher costs associated with remediating land, so that it is ready to build on, and dealing with outdated infrastructure.

Crucially, not enough affordable homes are being built across West Yorkshire. The year 2022-23 saw 1,536 affordable homes delivered, the highest number completed in a single year since 2010-11, yet this is still not enough to meet demand<sup>10</sup>. As prices and household costs continue to rise, building more affordable homes remains central to our mission to ensure everyone in West Yorkshire has a warm, safe and secure place to call home.

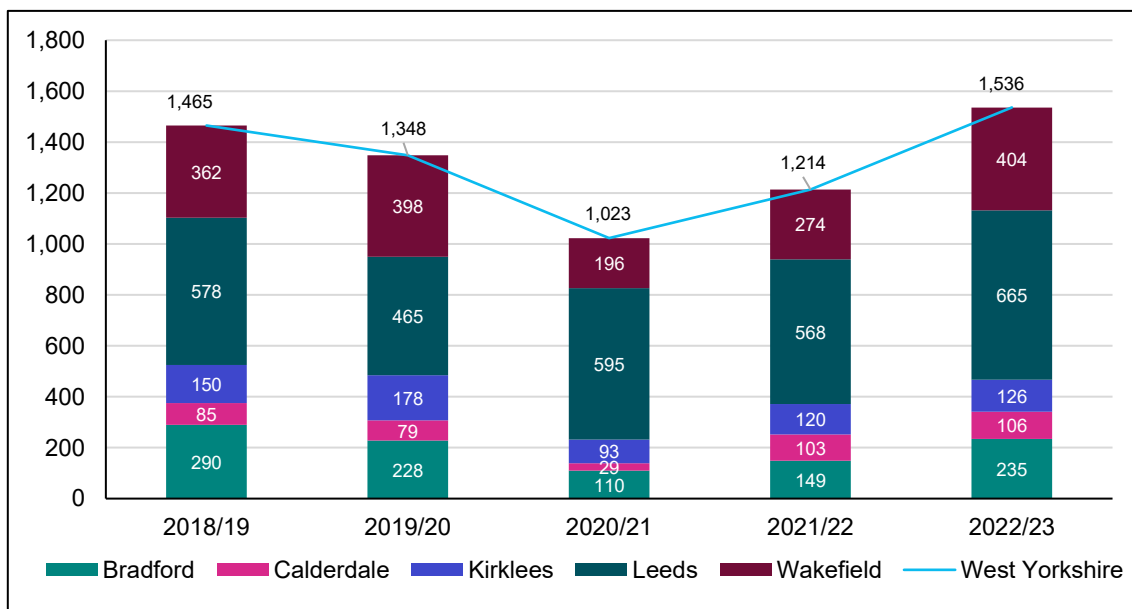


Figure 6 Affordable Housing Completions by Local Authority Area (2018/19 – 2022/23) - West Yorkshire  
Source: [DLUHC](#)

## Places and connectivity

Whilst comparatively lower house prices in many parts of West Yorkshire may be perceived as demonstrating affordability, this creates a significant challenge in attracting developers and investors where market values are lower than in other parts of the country. In addition, whilst house prices may be lower than the national average, wider cost-of-living pressures are often more intensely felt by people in West Yorkshire than in other parts of the country, exacerbated by poor connectivity.

Transport and housing costs are the two most significant items of expenditure for typical UK households. In West Yorkshire in the year to 2022, households were spending almost equal amounts per week on housing and transport (£65.70 and £64.50 respectively).<sup>11</sup> This high level of spend on transport indicates a clear need for better-connected places, supported by a robust public transport network, ensuring that people have greater choice in where they live and access opportunities. As we embark upon the delivery of our Connectivity Infrastructure Plan and the development of a Mass Transit network in West Yorkshire, improving the connectivity of the places is central to our strategy.

## Brownfield land and existing buildings

There is capacity for 56,000 new homes with planning permission in West Yorkshire, of which over 38,000 are on brownfield land.<sup>12</sup> However, across the region as a whole, brownfield sites contributed to just 46% of new homes actually delivered in 2022/23. Prioritising delivery on brownfield land is a key part of our strategy given that it is often sustainably located in existing urban areas, making it well connected to current and emerging transport networks. However, our industrial legacy means that brownfield land requires remediation so that it is ready to build on, and land is often owned by multiple parties, making delivery particularly complex.

In addition, West Yorkshire's long industrial heritage leaves a legacy of many beautiful buildings, but these buildings have often outgrown their original use. Work undertaken by Historic England in 2018 showed that there were 922 textile manufacturing sites across West Yorkshire surviving in some built form with 157 of these being protected as listed buildings. It is estimated that there is some 736,565 square metres that is vacant or under-used.<sup>13</sup> As well as manufacturing sites, our town centres are filled with architecturally unique buildings, many of which are often underused and prime for renovation to support town centre living, with great connectivity and supported by a strong local cultural and leisure offer. Whilst reuse of existing buildings and delivery on brownfield land can be challenging, maximising the potential of our towns and cities is at the core of our strategy.

### **Diversity of provision**

To boost the delivery of the right homes in the right places, we need a range of providers to work with us and across our region. From housebuilders with the capacity to build at scale, through to locally driven interventions such as community-led housing providers and self-builders, provision needs to be diverse and innovative to meet regional housing demand. West Yorkshire already has well-established partnerships that share our ambition to create sustainable and affordable homes and great places to live, including the West Yorkshire Housing Partnership, which brings together the main providers of affordable housing in the region. Leeds is also home to People Powered Homes who are championing the community-led housing sector on a national scale and are proactively supporting community-led development across West Yorkshire. There is also a clear demand for greater self and custom-build homes in the region. For example, in Bradford 1,175 households are registered on the council's self-build register and in Kirklees, the household survey identified 2,613 households who would be interested in self-build.<sup>14 15</sup>

It is often more challenging for small and medium-sized enterprises (SMEs), affordable housing providers and community-led developers to compete with volume builders to access land and develop the homes communities need. Whilst affordable housing delivery has seen a marked improvement in West Yorkshire, the operating environment is becoming increasingly challenging – as well as being faced with increased development costs, providers are also having to balance investment in existing stock, ensuring homes are fit for the future. Community-led housing groups also told us they often lack the upfront investment needed to progress projects into delivery.

### **Workforce and supply chains**

The construction sector in West Yorkshire currently employs 70,000 people, but this is an ageing workforce that has been in decline over a number of years.<sup>16</sup> A skilled construction and development workforce is critical to achieving the growth we need. It is well documented that the construction industry nationally is facing a skills shortfall with an additional 225,000 construction workers needed in the UK by 2027.<sup>17</sup> In addition, critical resources in planning and other local authority teams have also seen a decline, particularly in the North where planning teams reduced by 65% between 2010 and 2019.<sup>18</sup> As we move towards a more sustainable future, we will also see the need to increase green skills across the workforce, particularly in the construction sector as we seek to increase off-site manufacturing and modern methods of construction.

Delivering the homes we need also relies on robust and resilient supply chains. The period of lockdown caused by COVID-19, followed by successive disruptions to international supply chains as a result of global conflicts, have led to significant increases in material costs and availability, with cost increases of 10.4% between 2022 and early 2023, which followed an 11.2% increase from 2021.<sup>19</sup>



# Outcomes

### **Deliver a robust pipeline of housing development opportunities aligned to well-connected places**

We will continue to work closely with our partners to develop our housing pipeline and identify the tools available to unlock and accelerate delivery, with a strong focus on maximising affordable homes. We recognise the importance of creating well-connected places where people can access good jobs and opportunities easily and will build this into our emerging Economic Strategy. As we embark upon the implementation of the West Yorkshire [Connectivity Infrastructure Plan](#), update our West Yorkshire Local Transport Plan and develop a new mass transit system across the region, we will work to align our transport and housing investment in places and communities that can benefit most from a better-connected region – ensuring more people are connected to opportunity through sustainable and active travel modes, and creating more attractive places to live.

### **Support local authorities to deliver on housing need set out in local plans**

We will build on our strong track record of working with local authorities to invest in and deliver much needed new homes across the region capitalising on the successes of the [Brownfield Housing Fund](#) and other programmes of delivery in the region. We will make a bold case for greater devolved funding that supports the development of excellent quality new homes in West Yorkshire, which should be tailored to meet local needs and recognise the challenges of our regional market. We will continue our relentless focus on maximising the number of affordable homes delivered in the region. We will work to establish the West Yorkshire Housing Developer Forum bringing together public and private sector partners with a shared ambition to create great places and build new homes across all parts of West Yorkshire. This forum will highlight opportunities across the region and explore innovative solutions to boost delivery.

### **Improve the number of sustainable homes developed**

Our partners share our ambition to develop sustainable homes that meet the needs and requirements of people and communities, and we are committed to deepening our partnerships with a range of sustainable and innovative delivery partners, including the community-led housing sector, small and medium-sized enterprise (SME) developers and a range of affordable housing providers, to diversify the provision of new homes. We will explore new ways of working together and unlocking the barriers to delivery often faced by those aiming to go the extra mile, providing the highest standard and quality of affordable homes. We will work with partners to identify the skills, expertise and supply chains needed to make sure that our homes are equipped for our net zero-carbon future by 2038. We will also encourage futureproofed homes by supporting our local authority partners to secure high-quality, low-carbon development across the region. To avoid the need for additional retrofitting, we will support our local authority partners to implement requirements such as the Future Homes Standard, and to ensure that developments have robust, climate-resilient infrastructure to protect residents from risks such as flooding.

### **Increase in the homes delivered in Spatial Priority Areas**

The launch of the [West Yorkshire Strategic Place Partnership](#) marked an important milestone, cementing our commitment as the West Yorkshire Combined Authority, Homes England and our five local authorities to work together to unlock the delivery of homes as part of a co-ordinated approach to the regeneration and transformation of our places. The Partnership recognises 16 of the most transformational housing-led development opportunities across West Yorkshire's [Spatial Priority Areas](#) with the potential to deliver 40,000 new homes over the next decade. Through the Partnership we will work together to align our resources, funding and priorities at an early stage so we are well prepared to deliver much needed homes. We will provide resource and capacity locally and regionally to develop projects supporting delivery of good quality homes across our Spatial Priority Areas.

## Objective 2: Increasing the provision of truly affordable, accessible and adaptable homes

There are not enough affordable homes in West Yorkshire to meet present and future demand. Within our [West Yorkshire Plan](#) we committed, under Mission Two, to creating a truly affordable housing offer to meet the needs of people and communities. The expansion of the private rented sector, where rents are not regulated, coupled with the loss of social homes through the Right to Buy scheme, has meant that a growing number of households face affordability issues and insecurity of tenure. These issues exacerbate homelessness and rough sleeping. Turning to future demand, homes across our region will need to adapt across our life course to support better quality of life for residents with support needs. We are committed to developing a high-quality housing offer that supports the health of our region by improving access to truly affordable, accessible and adaptable homes.

### What we are doing now

West Yorkshire delivered more affordable homes in 2022/23 than any year since the global financial crisis and we are supporting the delivery of more affordable homes through our **Brownfield Housing Fund** and work with Homes England. We are driving forward dementia-ready housing across our region through our **Dementia-Ready Housing Taskforce**. The West Yorkshire Housing and Health Network has established a set of joint priorities where housing activity can support people to live a long, healthy life.

## Rationale

### Accessing a home

There are nearly 85,000 households on housing waiting lists across West Yorkshire,<sup>20</sup> and in the last year nearly 12,000 households were owed homelessness duties across our five local authorities.<sup>21</sup> The leading causes of homelessness appear to be family or friends unable or unwilling to continue to provide accommodation (29%) and end of private sector tenancies (23%), however it is worth noting that these reasons often mask wider vulnerabilities that people homeless or at risk of homelessness are facing.<sup>22</sup> The level of acute housing need indicated by these numbers creates a challenging operating environment for our local authority housing options teams, with over 1,100 households in temporary accommodation, nearly 100 of which are households with children often placed in hotel or bed and breakfast accommodation.<sup>23</sup> Underrepresented groups often face an increased risk of experiencing homelessness due to a variety of factors, for example LGBTQIA+ individuals are reported to be at a higher risk of homelessness associated with discrimination.

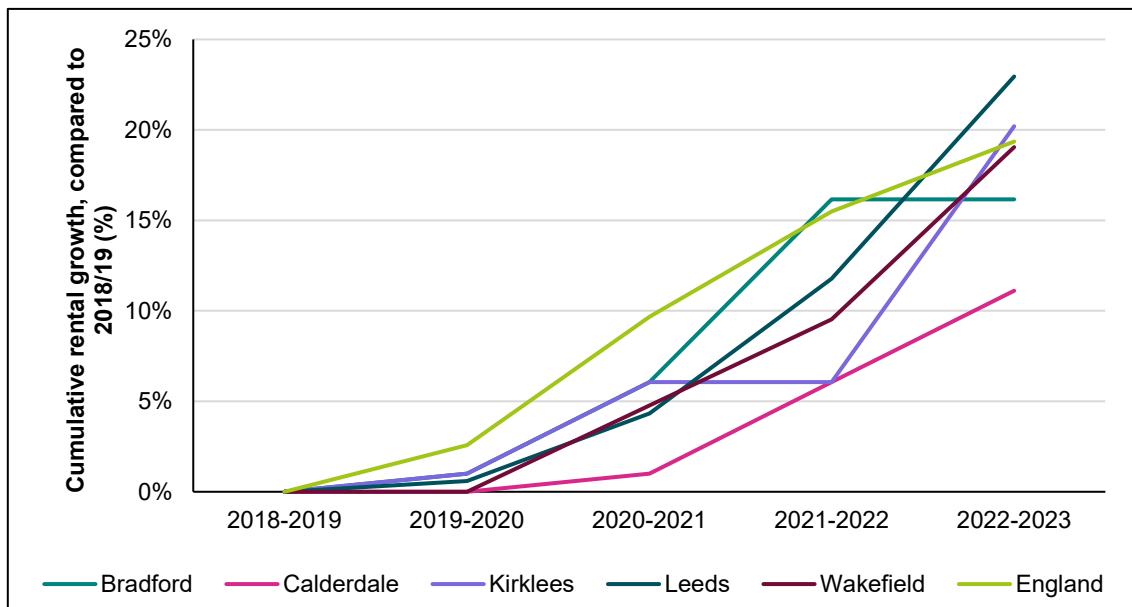
Rough sleepers and those in temporary accommodation are subject to elevated levels of violence. Research commissioned by our [Violence Reduction Partnership](#) found that nearly three-quarters (73%) of individuals who had recently experienced homelessness or slept rough in West Yorkshire felt unsafe, and nearly a third (29%) were subject to violence because of their homelessness.<sup>24</sup>

### Affordability (rent)

Between 2022 and 2023, rents for three-bedroom homes across England rose by 4%. With the exception of Bradford, all West Yorkshire districts experienced higher growth than England (Kirklees 13%, Leeds 10%, Wakefield 9%, and Calderdale 5%). In the five years between 2018 and 2023, rents in Leeds have increased by around 23%, significantly outpacing national average increases (19%).

These increases have significant consequences for affordability. Our analysis indicates that nearly 40% of households living in the private rented sector cannot afford current average monthly rent costs in West Yorkshire, and affordability has decreased by 10% over the last four years. This means

that if rent increases continue to significantly outpace wage increases, affordability will continue to decline rapidly.<sup>25</sup>



**Figure 7 Rental price growth since 2018/19 - West Yorkshire**  
 Source: ONS Private rental market summary statistics in England

Affordability pressures are felt most acutely by households on low incomes. A low-income family that requires Local Housing Allowance (housing benefit) to pay the average three-bedroom rent in Leeds will have an annual shortfall of over £1,500 per year. This is money that will have to be diverted from essential living costs, driving up poverty across West Yorkshire. Our modelling suggests that a dual-earning minimum wage household in West Yorkshire where one member works full time and the other part-time (4 days per week) cannot afford the average rent on a three-bedroom property, and would struggle to do so even where both earners work full-time on minimum wage.<sup>26</sup>

Local authority	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
<b>Bradford</b>	£495	£500	£525	£575	£575
<b>Calderdale</b>	£495	£495	£500	£525	£550
<b>Kirklees</b>	£495	£500	£525	£525	£595
<b>Leeds</b>	£671	£675	£700	£750	£825
<b>Wakefield</b>	£525	£525	£550	£575	£625

**Table 1 Monthly private rents (3 bedroom) by local authority area - West Yorkshire**  
 Source: ONS private rental market summary statistics in England

**Affordability (home ownership)**

Affordability issues in the private rented sector, as well as the challenging macro-economic environment, have a knock-on effect on the accessibility of home ownership as households struggle to save for deposits. Whereas 84% of first-time buyer households could afford a mortgage on the average West Yorkshire property in 2019, by 2023 only 62% could indicating a significant decline in the accessibility of home ownership.<sup>27</sup> Worsening affordability of homes for purchase can be seen in a simple house price to earnings ratios across the region, with a 66% increase in the ratio of wages to house prices between 2002 and 2022 in **Figure 8**. However, such ratios fail to account for challenges specific to our region, including the high relative cost of transport to access jobs across our region and higher costs associated with heating our ageing and fuel-inefficient housing stock, which disproportionately affects households struggling to buy their first home.<sup>28</sup>



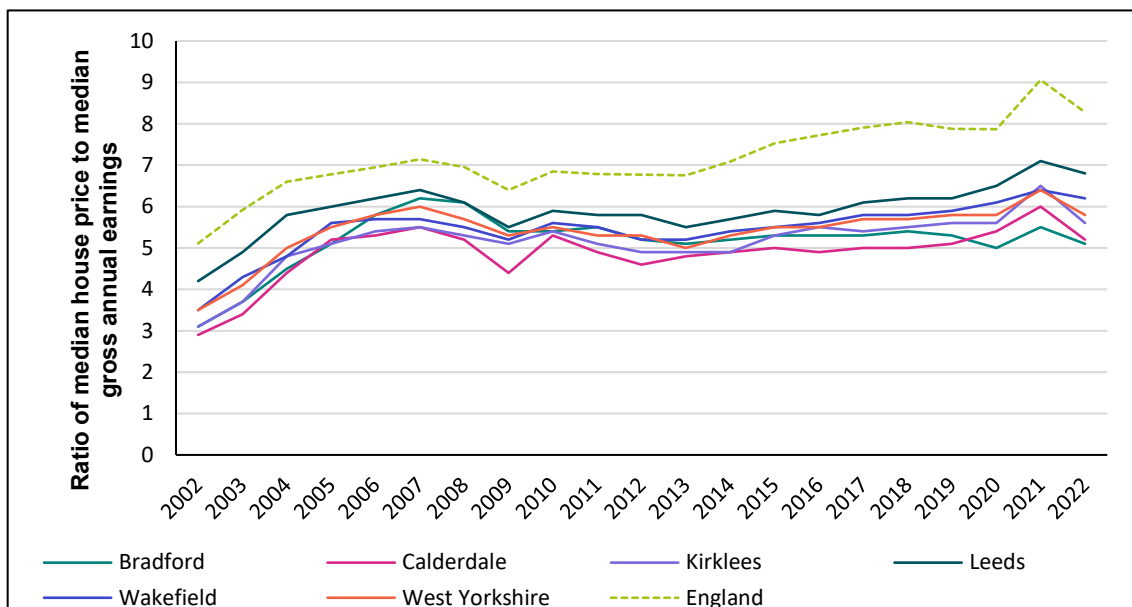


Figure 8 Ratio of median house price to median gross annual earnings  
Source: [ONS](#)

### Homes to support health and independence

Some of our residents require specialist or supported accommodation to help them live independently. Inappropriate accommodation or support arrangements can place immense strain on families, lead to the breakdown of community living arrangements and may lead to hospital admissions or homelessness. Equally, a lack of available supported accommodation to meet needs may also prevent timely discharge from hospitals or other settings. It is estimated that, across West Yorkshire, over 6,000 people have support needs arising from learning disabilities and autism, and over 2,500 people have support needs arising from severe mental health issues.<sup>29</sup> A recent gap analysis conducted on behalf of the West Yorkshire Health and Care Partnership indicated that over 1,300 supported or specialist accommodation homes are required over the next decade to meet this need across our region.<sup>30</sup>

### Adaptable homes for life

West Yorkshire, in line with national trends, has an ageing population.<sup>31</sup> Healthy life expectancy across the region is below the national average, which means residents may require adaptations or support in their home at an earlier age.<sup>32</sup> It is important to emphasise the social, cultural and health diversity of those in mid and later life, and whilst poor health is not inevitable, homes should be adaptable to support residents with daily activities to enable ageing-in-place.

Homes across the region also have a significant potential role in preventing poor health. Research shows that low-cost home modifications can lead to a 26% reduction in falls requiring medical treatment,<sup>33</sup> yet it is estimated nationally that 93% of homes lack basic accessibility features.<sup>34</sup> Homes that fail to adapt to changing needs also impact hospital discharge. For example, patients with dementia occupy around a quarter of acute hospital beds, posing a significant challenge for the NHS.<sup>35</sup>

# Outcomes

### **Increased delivery of affordable housing across all local authority areas**

We will continue to work closely with the West Yorkshire Housing Partnership and Homes England to identify, unlock and support the delivery of affordable homes and develop a robust pipeline across the region. We will look to maximise the potential for delivery on brownfield sites through existing funding and make the case for further devolved funding to support this. With our local authority partners, we will continue to explore delivery models and policy tools that can boost affordable housing delivery. We will commission work with local planning authorities to explore the alignment of viability assessments across West Yorkshire to present a clear and consistent approach to affordable housing delivery expectations.

### **Improved access to the housing market for low-income households**

We will develop a clearer understanding of affordability challenges across our region, focusing on low-income households. This work will span across tenures, looking at the impact on those struggling to access or maintain home ownership, as well as those struggling to access or maintain tenancies in the private and social rented sector. We will continue to make a strong case to central government to support people on low incomes, such as linking the Local Housing Allowance to the rising cost of rents. We will make the case for greater local control of the Affordable Homes Programme to allow us to target funding and interventions to increase the delivery of social housing, delivered by local authorities and other registered providers in the region, that meet local need.

### **Support local authority partners to address housing need**

With our local authority partners, we will focus on where Combined Authority activity can add value to their existing work on housing need, focusing on support for residents struggling to maintain their existing living arrangements, and support for those struggling to access accommodation. We will develop a regional understanding of temporary accommodation, ensuring that provision is both cost-effective and of a decent quality, advocating for our local authorities by making the case to central government for sufficient funding and a pipeline of accommodation to meet increasing demand. We will work to understand the housing needs of diverse and minority communities within our region, including residents with disabilities, LGBTQIA+ households, people from ethnic minority backgrounds, Gypsy and Traveller groups, and European Roma communities.

### **Increased support for local authorities tackling homelessness**

We will consider where Combined Authority activity can add value to local approaches to homelessness, and whether models adopted elsewhere (such as Housing First or other trauma-informed approaches) could benefit the region, making the case to government to roll out support and learning from areas which have undertaken pilot schemes. We will also progress our work on experiences of housing instability and violence, working to ensure that those facing multiple disadvantage and homelessness across our region feel safe to access the support that they need.

### **Increased level of accessible and adaptable housing**

We will bring together colleagues across housing and health to understand current and future need for supported housing for those with additional needs, including purpose-built accommodation, and how our activity can support the development of a robust pipeline to meet needs. We will seek to take a joined-up approach across housing and health, building on our recent Partnership Agreement with the West Yorkshire Integrated Care Board and make a bold case for further devolution to ensure housing models support the health and care needs of our ageing population and residents with health and care needs. We will continue to work, through our West Yorkshire Dementia-Ready Housing Taskforce, to improve the well-being of those living with dementia in West Yorkshire and their carers and ensure that our housing provision is appropriate for the dramatically rising levels of dementia we are experiencing across our region. 96

## Objective 3: Improving the quality of our existing homes

Housing is an important social determinant of health, and Mission Two of our [West Yorkshire Plan](#) recognises the significance of good quality and energy efficient homes for individual and community well-being. Improving the quality of the homes we already have across West Yorkshire will be key to delivering a high-quality housing offer across our region. Yet, housing across West Yorkshire is generally older, lower-quality and less energy efficient than the average home in England. This makes our homes more expensive to live in and keep in a good state of repair, but also means that our homes can have significant negative impacts on the health of our residents. Decarbonising our housing stock is an important element of our work under Mission Four of the [West Yorkshire Plan](#) and our [Climate and Environment Plan](#) as we work towards a net-zero carbon economy by 2038.

### What we are doing now

We are developing our **Better Homes Hub** to support everyone in West Yorkshire to live in a warm, comfortable and low-carbon home. Alongside our partners, we are investing over **£40 million to retrofit over 5,000 social homes** through the Social Housing Decarbonisation Fund. We have established a partnership agreement with the West Yorkshire Integrated Care Board that will help us to strengthen the partnerships between housing and health professionals across the region.

## Rationale

### Energy efficiency

Our region has an ageing housing stock, with a quarter (25%) of our homes built before 1919.<sup>36</sup> There are particular concentrations of older homes surrounding our major cities, Leeds and Bradford, as well as neighbourhoods in our industrial valleys of Bradford, Calderdale and Kirklees. These homes are typically less well insulated and often more expensive and difficult to retrofit.

This means that our homes are also less energy efficient. Just over a third of our homes (38%) have a reasonable level of thermal efficiency, measured at EPC C or above. This is lower than the national average (47%). The five local authorities also have a lower proportion of A-C certificates than the national average, ranging from 33% (Bradford and Calderdale) to 41% (Leeds).<sup>37</sup>

The Mayor of West Yorkshire and the West Yorkshire Leaders have declared a climate emergency, and set an ambitious target for the region to be net-zero carbon by 2038. Our homes contribute over a quarter (26%) of the region's existing carbon emissions. Improving their energy efficiency is an essential part of realising this ambition, as set out in our [West Yorkshire Climate and Environment Plan](#).

Decarbonising our homes will require concerted efforts at a local and regional level to develop supply chains and bring down the per-home cost of retrofit activity. Part of this activity will also include scaling up our workforce development to ensure that we have the skills we need to deliver on our ambitions. Initial estimates on the level of retrofit required across our region indicates a need for a 30,000 strong workforce to be developed and sustained up to 2038.<sup>38</sup>

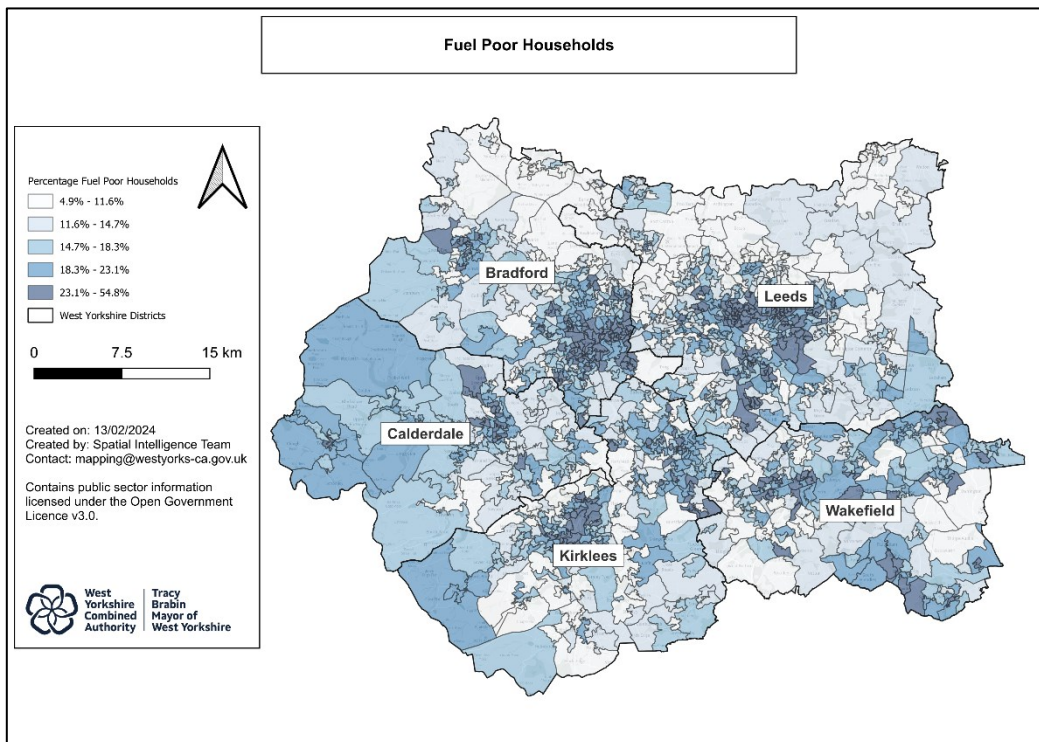


Figure 9 Fuel Poor Households West Yorkshire  
Source: WYCA/BEIS

### Fuel poverty

One of the consequences of poor energy efficiency in our homes is higher levels of fuel poverty. It is estimated that 29% of West Yorkshire households are in fuel poverty, which is a significantly higher proportion than is estimated nationally at 21%.<sup>39</sup>

We recognise that retrofitting our homes will, in the medium to long-term, help to reduce energy costs for our residents, including those in fuel poverty. However, more immediate action is needed to respond to the energy needs of households in crisis.<sup>40</sup> There is also a correlation between neighbourhoods that fall into the most deprived decile within the Index of Multiple Deprivation (IMD) and older properties with poorer EPC ratings, which suggests that those in low socio-economic areas are often disproportionately impacted by our thermally inefficient homes.

### Decent homes

National statistics show that there is a strong relationship between energy efficiency and housing quality, and over half of homes with poor energy efficiency do not meet the Decent Homes Standard.<sup>41</sup> This is exacerbated by a high proportion of pre-1919 homes across West Yorkshire which often were not originally built to meet today’s living standards.

Official estimates indicate that one in every five homes (21%) across West Yorkshire does not meet the Decent Homes Standard, which is higher than the national average (17%).<sup>42</sup> Non-decent homes may not meet statutory minimum safety standards for housing or may be in a state of disrepair.

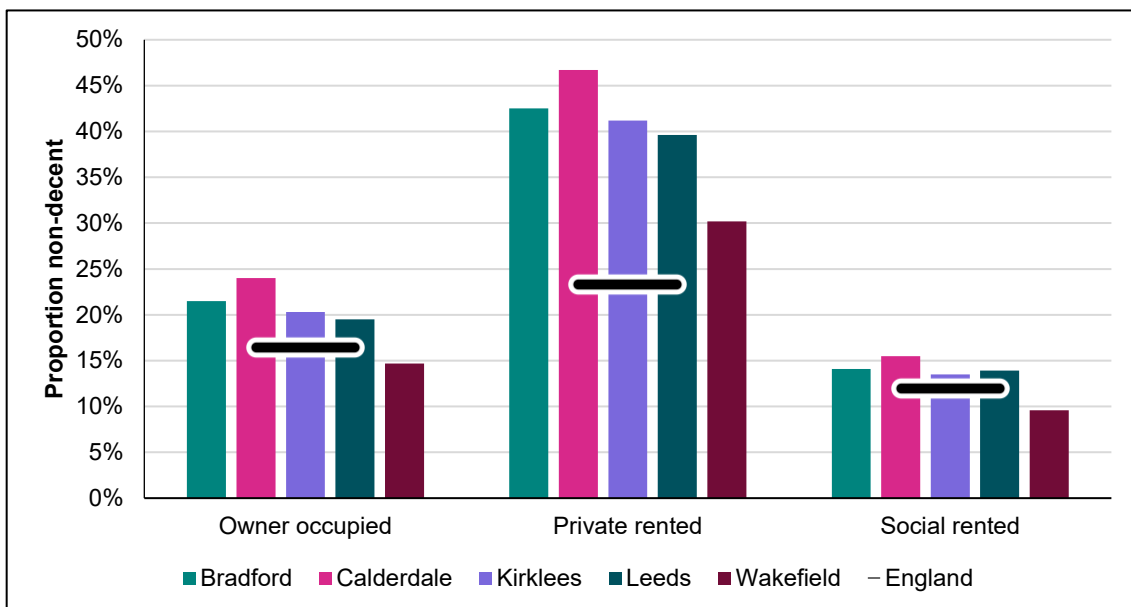


Figure 10 Non-decent occupied dwellings  
Source: [DLUHC](#)

The private rented sector is a cause for particular concern with an estimated two in every five privately rented homes (39%) failing to provide decent quality accommodation.<sup>43</sup> This is compounded by issues relating to affordability and access to the private rental market identified under **Objective 2**: Increasing the provision of truly affordable, accessible and adaptable homes, as well as the growing role of the private rented sector, indicating the need for urgent and concerted efforts in this area.

A decent home is also somewhere we need to feel safe and secure. Housing providers in particular are in a unique position to support prevention of crime by offering support and guidance to victims and communities. There is incentive for providers to intervene too, as research in relation to domestic abuse has found that cases of abuse are estimated to create housing costs of £160million per year.<sup>44</sup>

### Housing and health

Nationally, it costs the NHS an estimated £1.4 billion per year to treat conditions related to poor housing. Respiratory conditions related to cold homes which are more prone to damp, mould and condensation are a particular concern with estimates suggesting that mitigating excess cold would save the NHS over £850million alone per annum. Taking into account wider societal and economic impacts, the total cost to society of poor housing in England is likely to amount to around £18.5 billion per year.<sup>45</sup>

West Yorkshire faces particular population health challenges. Healthy life expectancy (at birth) for both women and men in West Yorkshire is much lower than the national average.<sup>46</sup> Whilst housing is not the only determinant of healthy life expectancy, the relationship between housing conditions, poorer households and poor health is clear. Housing is identified as a key social determinant of health in the [NHS Long Term Plan](#) and research from Shelter found that poor housing conditions increase the risk of severe ill-health and disability by up to 25%.<sup>47</sup> There are a range of programmes already underway across West Yorkshire demonstrating the positive impact of successful housing initiatives can have on health and housing for our population, and work is underway through established partnerships to explore the further development of these initiatives.<sup>48</sup>



# Outcomes

## **Work towards eliminating non-decent homes across West Yorkshire**

We will work with our local authority partners to understand existing support available for households living in non-decent accommodation across all tenures, enable interventions that improve the quality of existing homes, and make the case for further devolved funding to tackle decency issues across our region. We will align our investment in energy efficiency with improvements in housing conditions to support addressing poor quality housing. We will work with our partners both in housing and policing and crime to explore ways to improve home safety, initially focussed on supporting victims of domestic violence. We will make the case for a long-term, sustainable approach to investment in decent, climate resilient homes across our region.

## **Improve the quality of homes in the private rented sector**

A significant proportion of our private rented sector is failing to provide decent homes for our residents. We will work with our local authority partners to build an understanding of their existing powers and enforcement capacity, sharing best practice and supporting capacity within the region wherever possible. We will seek to identify best practice from across the region and other areas to implement measures that improve the quality of the private rented sector. We will use this to continue to make the case to central government for devolved powers to tackle the acute issues that exist across the private rented sector in West Yorkshire.

## **Increase the number of low carbon homes to work towards our net-zero targets by 2038**

The Combined Authority has set out an ambitious route to net zero by 2038. Housing is a major contributor to our carbon emissions. In order to reach our targets by 2038, collectively we need to:<sup>49</sup>

- Retrofit 680,000 homes to at least an EPC C rating
- Install 665,000 domestic heat pumps
- Deploy district heating to 250,000 homes
- Install 171,000 domestic solar panel (PV) systems

We will work towards this by establishing a Better Homes Hub including a one-stop shop for retrofit advice and support across the region. We will continue to make the case to central government for devolved funds and powers to accelerate our retrofit activity across West Yorkshire, and ensure that our homes are resilient to meet the demands of our changing climate.

## **Reduce the proportion of households in fuel poverty**

We will continue to target our devolved funding, where possible, to deal with cost-of-living pressures felt most acutely by those in poverty. We will work to ensure that our retrofit and other net zero activity prioritises groups that will benefit from energy efficiency measures, and tailor our approach to ensure that those measures deliver cost savings to residents.

## **Reduce the incidence of health issues related to housing quality**

Poor quality housing has significant consequences for the health of our residents. Building on our [partnership agreement with the West Yorkshire Integrated Care Board](#), which recognises housing as an area for joint activity, we will work strategically with partners in health and social care, housing providers and local authorities. We will mobilise a shared evidence base on the key issues facing our region and, using this data-led approach, we will work in partnership to develop targeted interventions and support the wider implementation of programmes and initiatives that reduce the impact of poor quality housing on the health of our region.

# Objective 4: Creating resilient places that support the well-being of our residents

West Yorkshire is made up of vibrant and thriving communities, but health and prosperity are not spread equally across the region. In some of our places, this inequality means residents have poor access to local amenities, green space and active travel infrastructure to exercise and thrive. Some places see higher rates of violence and anti-social behaviour. Mission Two of our [West Yorkshire Plan](#) sets out the role of great places and healthy communities in tackling these inequalities. Through our interventions, we will build on the strengths of our existing places, ensuring that our homes and communities play their vital role in supporting the health, safety and happiness of West Yorkshire residents. We must work to ensure that our physical, digital and community infrastructure are robust, and that our neighbourhoods are great places to live and play, where people can safely walk, wheel and cycle. This infrastructure is essential to realising our ambitions under Missions Three and Five of our West Yorkshire Plan to be a region where active travel is the easiest choice for short journeys, and where all people feel safe in their communities.

## What we are doing now

We are delivering cycle lanes, traffic-free paths and ‘school streets’ through **£23 million of active travel funding**. We are investing up to **£22 million across West Yorkshire to reduce flood risk**. We have launched our Safer Parks Guidance to improve access to public recreational space for women and girls across the region.

## Rationale

### Inequality within our communities

Across our region, rates of home ownership, security of tenure, homelessness and other housing metrics differ when considering the influence of age, gender, ethnicity, disability and other protected characteristics.<sup>50</sup> This structural inequality has a negative impact on housing stability and access to accommodation – for example, our research suggests that ethnic minority communities are disproportionately represented in areas of high deprivation.<sup>51</sup> Violence is also more prevalent in areas with higher levels of deprivation and poorer quality homes, with 41% of individuals admitted

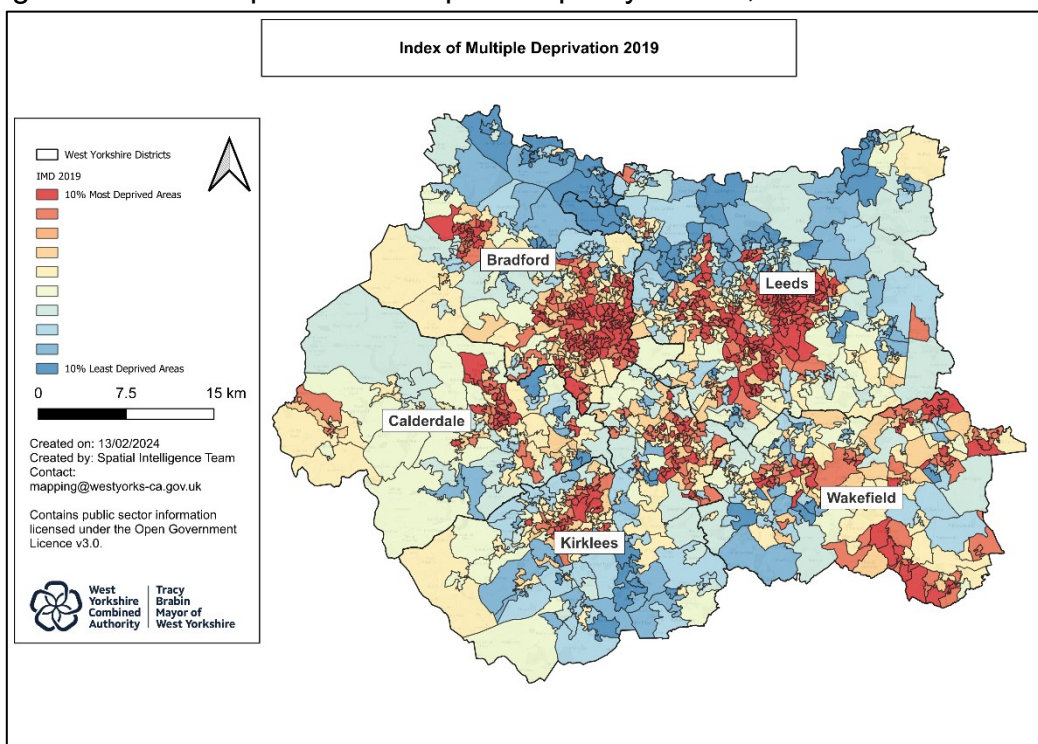


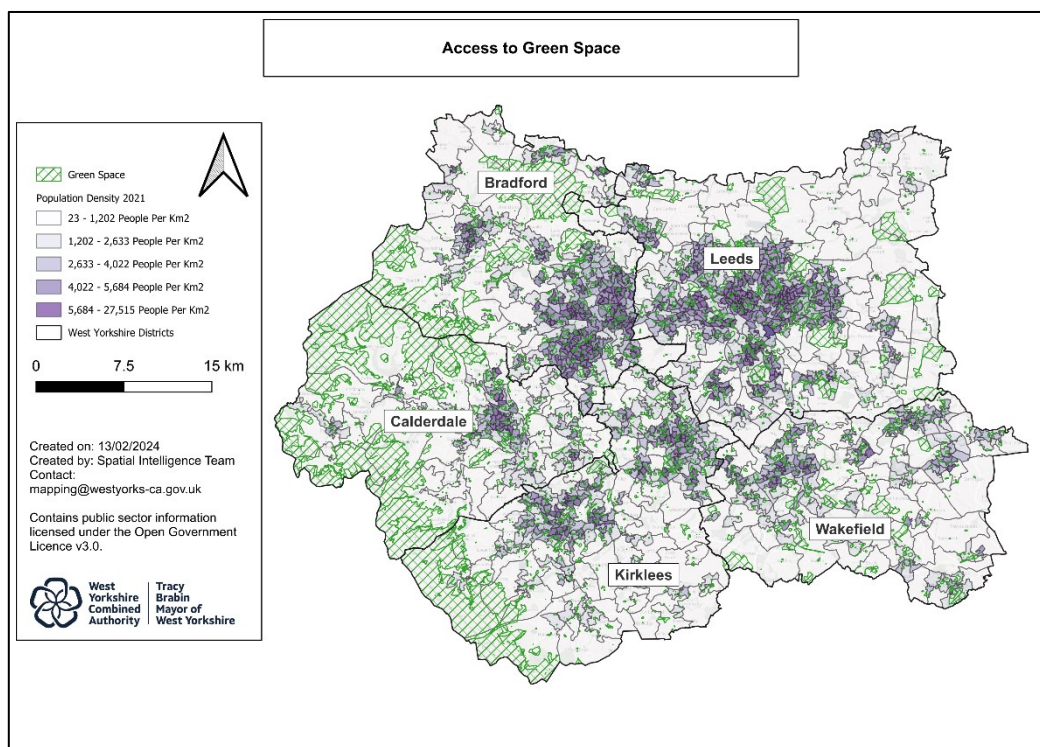
Figure 11 IMD Detail 2019 by LSOA  
 Source: [DLUHC](#)

to hospital with injuries relating to violence living in areas of West Yorkshire that fall within the bottom 10% of the Indices of Multiple Deprivation index.<sup>52</sup>

Evidence also indicates that minority communities are more likely to experience housing deprivation than white households. For example, Gypsy and Traveller households are 7.5 times more likely to experience housing deprivation, and many sites allocated to accommodate Gypsy and Traveller communities suffer disproportionately from issues such as noise and air pollution.<sup>53</sup>

## Access to green space and play

Green space and water environments are vital to the quality of our lives and the natural ecosystem. Only around a quarter of West Yorkshire residents have access to local natural green space which is accessible within a 5-10 minute walk.<sup>54</sup> There are also significant geographical variations – whilst two-thirds of West Yorkshire residents are within 2 kilometres of 20 hectare green space, such as a public park or garden, only 38% of Kirklees residents have this level of access.<sup>55</sup> Research also indicates that people from ethnic minority communities are twice as likely to live in an area with green space deprivation.<sup>56</sup> Data indicates that green space deprivation in West Yorkshire is most pronounced in Bradford and Calderdale, where people from ethnic minority backgrounds make up 57% and 60% of the population respectively.<sup>57</sup>



**Figure 12 Access to greenspace (300m access to 2 HA greenspace)**  
 Source: ONS and Natural England, 2023

The importance of parks for health and well-being is widely documented, but the benefits of local parks are not always easily available to women and girls. Many women and girls across West Yorkshire feel unsafe in our parks, reflecting broader issues of safety that go beyond parks and public open spaces.<sup>58</sup>

The availability of safe outdoor space is also important for the well-being of children across West Yorkshire, and play is a fundamental right recognised by the United Nations Convention on the Rights of the Child. However, some children do not have access to private outdoor space as part of their home environment and many are prevented from playing safely in the area surrounding their homes due to, for example, parked cars and traffic, or rubbish and litter.<sup>59</sup> Leeds is the first local authority in England to implement a full Play Sufficiency Assessment, which identifies the need for cross-service and cross-agency collaboration on an action plan to influence policies and approaches



to the built environment, with the aim of developing attractive and liveable neighbourhoods for children, families and for all members of the community.

**Safety of walking and cycling**

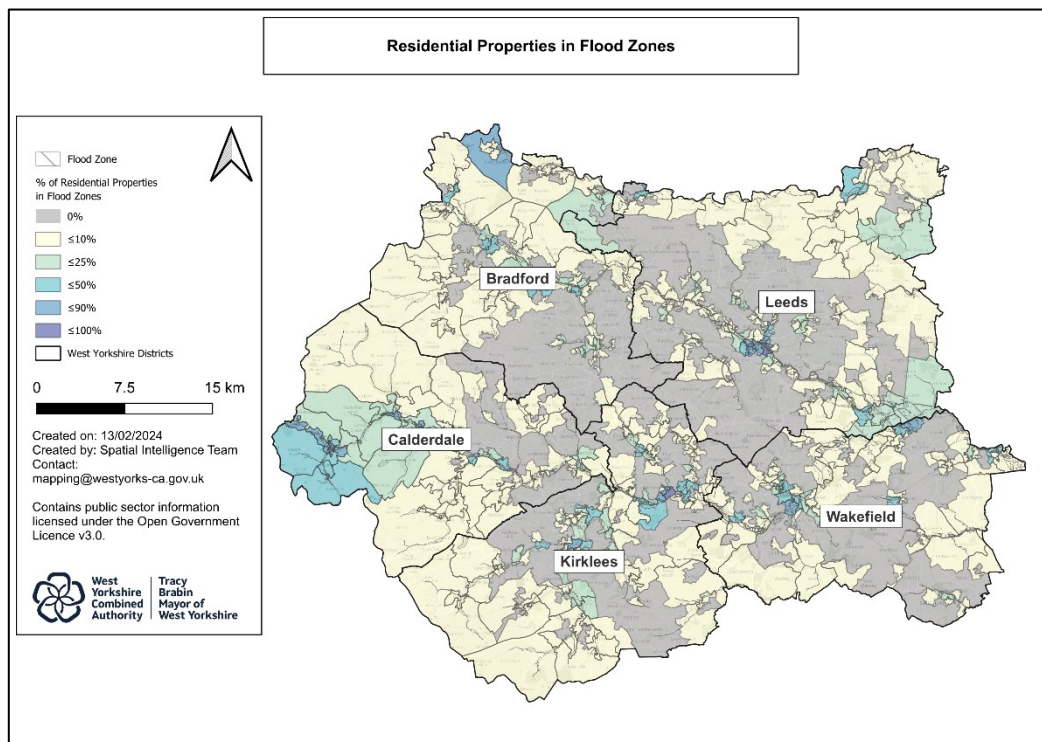
Our [Transport Strategy 2040](#) sets an ambition for the region to become a safe place for cycling and walking, to improve the quality and liveability of our places. Safe walking and cycling infrastructure are key to inclusive growth, and support prosperity for people and businesses across West Yorkshire. Walking accounts for around 39% of all trips made by West Yorkshire residents, which is higher than the England average (33%).<sup>60</sup> Yet, cycle trips represent only around 0.2% of all trips made by West Yorkshire residents, much lower than the 2% average across England.<sup>61</sup> West Yorkshire residents rely heavily on private car use, which accounts for 54% of trips across the region.<sup>62</sup>

**Resilience of infrastructure**

Our homes need good quality infrastructure to thrive. This requires sustainable neighbourhoods with good access to local amenities and facilities that support a good quality of life. West Yorkshire is made up of a network of unique cities, towns and villages all with their own identities and proud cultures which provide the foundations of great places to live. Our Strategic Place Partnership focus areas embed principles of placemaking at their core, recognising the importance of place and infrastructure in creating a sustainable housing offer.

A particular challenge in parts of West Yorkshire is a high and increasing risk of flooding, compounded by the climate crisis. Our [West Yorkshire Climate and Environment Plan](#) recognises that some areas are under severe and constant threat, particularly in the wetter autumn and winter months. Around 3% of properties in West Yorkshire fall within a flood zone, rising to 6% in Calderdale, and flooding will become a more frequent occurrence due to climate change.<sup>63</sup>

Digital connectivity, particularly fast and reliable broadband, is vital to the economic performance of West Yorkshire and to delivering inclusive growth. Levels of connectivity vary across our region. Leeds has the highest proportion of properties connected to full fibre, with nearly 80% of properties connected, whereas fibre connectivity remains much lower in Calderdale at 17%.<sup>64</sup>



**Figure 13 Residential Properties in Flood Zones**  
 Source: Environment Agency 2023

# Outcomes

### **Improved neighbourhood safety and health through improvements in quality of place**

We will work in a joined-up way across our region, in collaboration with colleagues such as the West Yorkshire Police, to ensure that housing within future and existing neighbourhoods supports the Safer Places and Thriving Communities priority set out in our existing [Police and Crime Plan](#). We will focus our investment in places that are in higher need with increased levels of deprivation, as our data shows that people living in these communities are at higher risk of crime.

### **Support for developments with access to green space and space to play**

We will support developments that improve access to green space and provide safe spaces to play close to home, focusing on those that make provision for areas that are currently more likely to face green space deprivation or insufficient space to play. We will continue to promote our [Safer Parks Guidance](#) and encourage cross-departmental working on women and girls' safety amongst our local authority partners, working towards safety and gender equity in green space, play and sports policies where they relate to housing development or interventions. As we develop delivery plans across our Spatial Priority Areas, we will embed considerations relating to access to green space, parks and space to play into our plans ensuring that quality of the natural environment is integral to our developments.

### **Support for developments that facilitate active travel**

We will support developments that improve connectivity for active travel within our region, including safe walking, wheeling and cycling infrastructure. We will work within our Spatial Priority Areas and areas identified within our Strategic Place Partnership with Homes England to improve active travel infrastructure so that residents can safely make journeys using healthier modes of transport, making active travel the natural choice for short journeys.

### **Improved infrastructure resilience**

We will work with our local authorities to leverage investment in community infrastructure creating sustainable places and improving access to amenities and facilities that are valued by local people. We are investing up to £22 million in West Yorkshire by backing an ambitious investment programme to reduce flood risk and to allow our communities and businesses to thrive. This includes our Natural Flood Management Programme, which focuses on reducing the frequency and damage caused by flooding, and our Flood Risk Management Infrastructure Programme. We will work with our local authority partners to ensure that current and future neighbourhoods have the climate-resilient infrastructure they need to thrive. Through our work on digital connectivity, we will continue to engage with the commercial sector to understand the reasons for market failure in certain areas, to ensure that all communities across our region have access to low-cost, high-speed internet. We will develop and implement a Digital Blueprint which will address areas of poor connectivity across the region.

# Appendix 1 - Delivering our objectives

## Objective 1: Boosting the supply of the right homes in the right places

Outcome	What we are doing now	What we are going to do (years 1-3)	Timescale	What we need to succeed
105 Deliver a robust pipeline of housing development opportunities aligned to well-connected places	We are working with partners to review and update our West Yorkshire Strategic Housing Pipeline and developing a pipeline of affordable homes with the West Yorkshire Housing Partnership	We will develop our networks and partnership working with alternative and innovative affordable housing providers such as community-led and co-housing partnerships	By August 2025	A long-term and sustainable increase in capacity and resource for Local Planning Authorities and associated services to accelerate the delivery of housing and related infrastructure
	<p>We are optimising the use of public sector land through the West Yorkshire One Public Estate Partnership</p> <p>We are aligning our approach with the principles of our <a href="#">Mass Transit Vision</a> and the <a href="#">Bus Service Improvement Plan</a> to connect our housing ambitions with economic opportunity</p>	We will proactively align housing-led development opportunities with connectivity and infrastructure improvements such as mass transit to maximise the opportunity for good quality housing growth around transport hubs. This will include working to develop synergy between this Housing Strategy and our forthcoming update to the West Yorkshire Local Transport Plan (LTP)	Aligned to LTP development in 2024/25	<p>A single settlement that includes full flexibility of investment programmes aligned to housing and regeneration which are focussed on achieving better outcomes for people and place</p> <p>Recognition through national funding programmes of West Yorkshire's local market and geographical circumstances to ensure we can maximise delivery through existing and future funding programmes across all places</p>
Support local authorities to deliver on housing need set out in local plans	<p>We are working with partners to unlock the housing pipeline of new and accelerated developments (for example through the £3.2m Housing Accelerator Fund [HAF])</p> <p>We are maximising the delivery of affordable housing as far as</p>	We will progress pipeline sites through to delivery by supporting marketing, disposal and delivery of housing to meet the delivery of over 9,000 homes per year on average (in line with projections set out in local plans)	<p>Quarterly pipeline review and monitoring underway</p> <p>Delivery of HAF</p>	<p>Greater certainty regarding the timescales of the Future Home Standard roll out and Government strategy ensure all homes are built to a net zero standard to meet</p>

<p>106</p>	<p>possible through our capital investment programmes such as the Brownfield Housing Fund</p>	<p>We will support local authorities to increase capacity across housing and planning teams to boost delivery by investing directly in local and regional resources</p> <p>We will work with partners to support addressing the skills shortage and supply chain challenges across the sector, including using our own funding to leverage investment in apprenticeships and other programmes aligned to housing and development</p> <p>We will embed the need for good quality and affordable homes in the development of our new regional economic strategy, creating joined up approaches between where people live and economic opportunity</p>	<p>programme 2023/24 – 2025/26</p> <p>Ongoing – aligned to capital investment programmes</p> <p>Aligned to economic strategy development by June 2024</p>	<p>West Yorkshire’s net zero by 2038 ambitions</p>
<p>Increase in the homes delivered in areas identified as Spatial Priority Areas</p>	<p>We are working with Homes England and partners to develop and implement delivery models across the Strategic Place Partnership focus area projects</p> <p>We have launched the West Yorkshire Housing Developer Forum to deepen our relationships with developers in the region to help us deliver strategic projects</p>	<p>We will work with partners to explore new and flexible delivery models that support the development of the 16 focus area projects identified within the Strategic Place Partnership</p> <p>We will maximise the use of our devolved powers, functions and funds to accelerate the delivery of strategic projects working with our local authority partners</p>	<p>Progression of delivery models for at least 7 SPP projects by March 2026</p> <p>Ongoing</p>	

		We will align our resources to deliver sustainable communities and prioritise regeneration which includes housing development (for example through aligning our Housing Accelerator Fund, Employment Land Accelerator Fund and SPA delivery model programmes)	By March 2026 (aligned to completion of HAF, ELAF and SPA programmes)
Improvement in the number of sustainable homes developed  107	We are prioritising delivery on brownfield land by delivering the £89m Brownfield Housing Fund, unlocking at least 5,400 homes by March 2025	<p>We will implement a brownfield and stalled site dashboard and toolkit to support developers to unlock brownfield and stalled site delivery</p> <p>We will work with partners, such as Historic England, to maximise the opportunities to bring existing building back into use supporting residential development in sustainable locations</p> <p>We will commission research to improve our understanding of MMC relevant to a West Yorkshire context and implement the recommendations working with Homes England</p> <p>We will work with partners to prepare for the implementation of the Future Homes Standard and improve the number of homes developed to a net zero standard across West Yorkshire</p>	<p>By April 2025</p> <p>Ongoing</p> <p>By August 2024</p> <p>TBC (dependent on Future Homes roll out)</p>

## Objective 2: Improving the provision of truly affordable, accessible and adaptable homes

Outcome	What we are doing now	What we are going to do (years 1-3)	Timescale	What we need to succeed
<p>Increased delivery of affordable housing across all local authority areas</p> <p>108</p>	<p>We are working closely with the West Yorkshire Housing Partnership and Homes England to identify, unlock and support affordable housing delivery and to develop a robust pipeline across the region</p> <p>We are ensuring that viability assessments supported through our Housing Accelerator Fund to maximise affordable housing contributions</p> <p>We are boosting the delivery of affordable housing as far as possible through our capital investment programmes such as the Brownfield Housing Fund</p>	<p>We will use our current and future investment in housing to leverage further affordable housing delivery across the region</p> <p>We will use any new flexibilities gained through devolution of the Affordable Homes Programme to maximise affordable housing delivery, including supporting the delivery of council housing where appropriate</p> <p>We will work with local authorities to align approaches to viability assessments through the planning system to simplify this process and provide clarity to developers on expectations of viability assessments across West Yorkshire</p>	<p>Ongoing (e.g. through BHF)</p> <p>TBC (dependent on Level 4 Devolution)</p> <p>By November 2024</p>	<p>Local control of future Affordable Homes Programme funds to ensure funding criteria and flexibilities are maximised in line with the regional market context as well as giving certainty to West Yorkshire providers of funding in the region</p> <p>Long term certainty that support for housing costs for those on low incomes, including local housing allowance, will keep pace with escalating costs of rent</p> <p>Clarity and certainty about the settlement for Local Government finance in coming years, which will support the critical financial pressure of temporary accommodation faced by local authorities</p>
<p>Improved access to the housing market for people on low incomes</p>	<p>We have undertaken research to understand the affordability of housing across our region across different tenures and in different neighbourhoods</p>	<p>We will focus our investment in the delivery of affordable housing and ensure this is maximised in areas under the greatest levels of affordability pressure</p>	<p>Ongoing</p>	<p>As the Older Persons Housing Taskforce reports its findings in 2024, commitment to work with West Yorkshire Combined Authority to implement the recommendations building on the</p>

## West Yorkshire Housing Strategy 2040

<p>Support local authority partners to address housing need</p>	<p>We are working with our local authority partners to explore affordable housing delivery models and policy tools that can increase affordable housing delivery</p>	<p>We will work with the five West Yorkshire local authorities to implement the recommendations of the affordable housing delivery models review seeking to increase the number of affordable homes delivered across the region</p>	<p>By February 2025</p>	<p>work of our Dementia Ready Housing Taskforce</p> <p>Greater funding certainty for the delivery of supported and specialist accommodation to meet the needs of our population</p>
<p>Increased support for local authorities tackling homelessness</p> <p>109</p>	<p>We are working with local authorities to identify current approaches to homelessness prevention and intervention and share best practice</p>	<p>We will review lessons learned from the three national housing first pilots and work with local authorities to identify areas where good practice can be applied to local areas</p> <p>We will use our networks through the policing and crime teams to explore pathways to support prison leavers and those vulnerable to homelessness to secure safe and stable accommodation</p> <p>We will continue to focus on providing affordable homes for families across West Yorkshire to support move-on from temporary accommodation into long term sustainable tenancies</p>	<p>By November 2024</p> <p>By April 2025</p> <p>TBC (further work with Local Authorities pending)</p>	

<p>Increased the level of accessible and adaptable housing</p> <p style="text-align: center; vertical-align: middle;">110</p>	<p>We have established a partnership agreement with the West Yorkshire Integrated Care Board that integrates housing as a core part of improving population health in West Yorkshire</p> <p>We are driving forward dementia-ready housing across our region through the Mayor’s Dementia-Ready Housing Taskforce, and have secured adoption of our dementia-ready housing criteria by the West Yorkshire Housing Partnership</p> <p>The West Yorkshire Housing and Health Network has led a successful Right-Sizing campaign to support residents to access properties that meet their needs</p>	<p>We will work with local authorities to gain a greater understanding of supported housing need across the region to guide our investment</p> <p>We will roll out our dementia-ready housing criteria in West Yorkshire, beginning with the West Yorkshire Housing Partnership members. We will monitor the number of new dementia-ready homes, and work with partners, including residents, to identify opportunities to improve the design of existing homes</p> <p>We will work with the West Yorkshire Inclusivity Champion to ensure that the voice of West Yorkshire’s ageing population is fed into our work to deliver adaptable homes for life</p> <p>We will identify the shortfall of new purpose-built housing for older people, such as extra care, to inform the development of programmes and interventions to increase delivery</p> <p>We will work with partners to help signpost people to housing options at an appropriate time, so that they can live comfortably and safely in their home</p>	<p>Ongoing</p> <p>Ongoing – monitoring approach to be considered by December 2024</p> <p>Ongoing</p> <p>By August 2025</p> <p>Ongoing (linked to the rightsizing campaign)</p>	
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## Objective 3: Improving the quality of our existing homes

Outcome	What we are doing now	What we are going to do (years 1-3)	Timescale	What we need to succeed
Work towards eliminating non-decent homes across West Yorkshire  111	We are aligning our investment in domestic net zero activity with the quality of housing overall, beginning with a focus on social housing through the Social Housing Decarbonisation Fund	<p>We will work with local authorities to develop our data and intelligence on the condition of housing stock in West Yorkshire to build a case for greater investment</p> <p>We will deliver a one-stop shop information and advice service to facilitate domestic retrofit and support residents to improve the thermal comfort of their homes</p> <p>We will work to build climate resilience into our retrofit and decency work, to understand how our homes can support residents facing the impacts of our changing climate. We will ensure housing is considered as part of our updated Climate and Environment Plan</p> <p>We will work with the West Yorkshire Housing Partnership to consider measures that improve safety in the home, starting with a focus on safety for victims of domestic violence</p>	<p>By September 2025</p> <p>By February 2025 (or sooner)</p> <p>Aligned to the Climate and Environment Plan refresh by March 2025</p> <p>By August 2025</p>	<p>Long term flexible devolved funding and powers for net zero, including devolved monies for retrofit of West Yorkshire's homes, including freedoms and flexibilities relating to the installation of measures across social housing stock</p> <p>Devolved funding to support improvements to the quality of our housing stock, starting with funding similar to the Social Housing Quality Fund devolved to other Mayoral Combined Authorities</p> <p>Security of tenure for residents across West Yorkshire's private rented sector and a clear route to challenge poor conditions and hold landlords to account</p> <p>Greater capacity for local authorities to take enforcement action against landlords providing poor quality housing in the private rented sector to improve quality for residents and subsequently improve health outcomes</p>
Improve the quality of homes in the private rented sector	We are working with partners to identify good practice across the region and in other regions to look at new approaches and	We will work with local authorities and our partners to set out our expectations of a good quality private rented sector in West	By December 2025	

	<p>interventions to improve the quality of homes in our private rented sector.</p>	<p>Yorkshire including a plan of how to improve quality across all tenures</p> <p>We will work with local authorities to improve conditions across the private rented sector, focusing on ensuring that landlords who receive rent through public funds, in the form of local housing allowance, provide decent accommodation</p> <p>We will launch a low-interest retrofit loan available to West Yorkshire small private landlords to support with financing the retrofit of their property</p>	<p>By August 2026 (following work on expectations of good quality PRS)</p> <p>By May 2024</p>	
<p>→ Increase the number of low carbon homes to work towards our net-zero targets by 2038</p>	<p>We are developing our Better Homes Hub programme with a vision to ensure everyone in West Yorkshire can live in a warm, comfortable and low-carbon home, to support our net-zero ambitions</p> <p>We are investing over £40 million to retrofit over 5,000 affordable homes using the Social Housing Decarbonisation Fund and match funding from partners</p> <p>We have launched the Mayor’s Big Climate Chat to help raise the profile of retrofit and what it means for residents across West Yorkshire</p>	<p>We will develop a regional one-stop shop to provide advice and support directly to residents and landlords regarding measures to retrofit their homes stimulating demand for domestic retrofit</p> <p>We will implement five area-based demonstrator projects that will test retrofit measures across different stock types and tenures across West Yorkshire</p> <p>We will launch a low-interest retrofit loan available to West Yorkshire residents to support homeowners with financing the retrofit of their property</p>	<p>By March 2025 (or sooner)</p> <p>By March 2025</p> <p>By May 2024</p>	

<p>113</p>	<p>We are delivering a scheme which provides in-person advice on energy efficiency retrofit and tests approaches to engaging seldom-heard and digitally excluded groups</p> <p>Alongside our local authority partners, we have gathered data and intelligence on the condition and energy efficiency of housing stock in West Yorkshire to inform targeting of retrofit interventions</p> <p>We are working to understand existing and future skills needs and supply chain challenges across our region to support our domestic retrofit and renewables activity</p>	<p>We will launch a residential collective buying scheme to provide more affordable technology for residents interested in installing solar panels</p> <p>We will provide a grant of £5 million to the West Yorkshire Housing Partnership to install solar power generation and battery storage technologies on up to 1,500 social homes</p> <p>We will launch a communications campaign to educate West Yorkshire residents on the benefits of energy efficiency retrofit and signpost to support.</p> <p>We will support interventions that deal with skills gaps and develop a robust and resilient supply chain for domestic retrofit and renewable activity.</p>	<p>By September 2024</p> <p>Commencing delivery April/May 2024</p> <p>Commenced December 2023 with Mayor's Big Climate Chat</p> <p>TBC</p>	
<p>Reduce the proportion of households in fuel poverty</p>	<p>We are delivering the Mayor's £3 million Cost of Living Emergency Fund which helps frontline services to support people to meet basic needs such as food, heating, mental health support and emergency advice</p> <p>We are delivering a Local Energy Advice Demonstrator scheme which provides in-person advice on</p>	<p>We will continue to secure significant investment for the retrofitting of social housing through government funding streams like the Social Housing Decarbonisation Fund.</p> <p>We will work with West Yorkshire Housing Partnership to produce a co-ordinated investment plan for</p>	<p>Ongoing (current SHDF in delivery)</p> <p>Ongoing</p>	

	<p>energy efficiency retrofit, which targets seldom-heard and digitally excluded groups</p>	<p>decarbonisation of social housing stock</p> <p>We will deliver a one-stop shop information and advice service to facilitate domestic retrofit and support residents to improve the thermal efficiency and comfort of their homes</p>	<p>By March 2025 (or sooner)</p>	
<p>Reduce the incidence of health issues relating to housing quality</p> <p>114</p>	<p>We are engaging with partners across the West Yorkshire Housing and Health Network and the Integrated Care Board to strengthen the links between housing, health and social care professionals</p>	<p>We will work with the West Yorkshire Integrated Care Board and our partners to identify best practice and interventions to support improving health through better quality housing in the region</p> <p>We will deliver a one-stop shop information and advice service to facilitate domestic retrofit and support residents to improve the thermal efficiency and comfort of their homes</p>	<p>By August 2025</p> <p>By March 2025 (or sooner)</p>	

## Objective 4: Creating places that support the well-being of our residents

Outcome	What we are doing now	What we are going to do (years 1-3)	Timescale	What we need to succeed
Improved neighbourhood safety and health through improvements in quality of place  115	We are aligning our approach to place and housing with the Mayor's Police and Crime Plan, focusing on creating safer places and thriving communities	<p>We will integrate safer places and developments through the review of the Policing and Crime Plan</p> <p>We will invest in creating safe and healthy places focussing on those communities with higher levels of deprivation which are highlighted as at higher risk of crime</p> <p>We will work with partners to build a consensus around what good quality places and high-quality design means for West Yorkshire and adopt this across the region</p>	<p>By March 2025</p> <p>Ongoing</p> <p>By November 2025</p>	<p>A single settlement that includes full flexibility of investment programmes aligned to housing and regeneration which are focussed on achieving better outcomes for people and place</p> <p>Greater alignment of existing funds to maximise investment in places that support the well-being of residents</p>
Support for developments with access to green space and space to play	We have worked with partners to launch our Safer Parks Guidance that sets out ten principles of design and management for parks professionals to improve access for women and girls	<p>We will work with partners to disseminate and implement our Safer Parks Guidance across the region</p> <p>Through our work to invest in Spatial Priority Areas and our Strategic Place Partnership projects, we will integrate improved access to green space as part of our delivery model and development agreements across sites to improve the access to good quality green space</p> <p>We will develop a Local Nature Recovery Strategy which drives a more co-ordinated and practical</p>	<p>Commenced November 2023</p> <p>By April 2025 (as part of delivery model work)</p> <p>By March 2025</p>	

		<p>approach to integrating nature into communities whilst delivering nature-based benefits in our places</p> <p>We will monitor the implementation of the Leeds City Council Play Sufficiency Assessment and Action Plan and look to facilitate opportunities for shared learning across the region</p>	<p>To commence June/July 2024</p>
<p>Support for developments that facilitate active travel</p> <p>116</p>	<p>We are investing £23million of Active Travel Funding delivering cycle lanes, traffic free paths and 'School Streets' programmes to help make walking, wheeling and cycling the natural choice for short journeys across West Yorkshire</p> <p>We are working with local authorities to promote active travel programmes and leverage investment to support active travel through developer contributions</p>	<p>We will work across the housing pipeline to integrate active travel as the natural choice for short journeys from home by integrating this into our delivery plans</p>	<p>2025/26 (as part of delivery model work)</p>
<p>Improved infrastructure resilience</p>	<p>We are using our Housing Accelerator Fund programme to develop proposals and delivery plans for projects which seek to maximise resilient community infrastructure and investment in place making across our Strategic Place Partnership focus areas</p> <p>We are investing up to £22m across West Yorkshire to reduce flood risk</p>	<p>We will support the development of resilient places through the development and implementation of our wider strategies, such as our Local Nature Recovery Strategy and the Flood Innovation Programme and our refreshed Climate and Environment Plan</p> <p>We will launch a new digital blueprint for West Yorkshire that</p>	<p>By March 2025</p> <p>Expected by December 2024 (or</p>

	<p>and allow our communities and businesses to thrive</p>	<p>will improve digital connectivity for West Yorkshire’s residents</p> <p>We will work with local authorities to develop delivery plans across our Spatial Priority Areas and Strategic Place Partnership projects that integrate community infrastructure to support the creation of sustainable places</p>	<p>sooner)</p> <p>Delivery model for at least 1 SPA by March 2025</p>	
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## Appendix 2 – Measuring our performance

We are developing a suite of performance indicators to measure performance against our objectives. The table below sets out some indicative measures that could be utilised for each objective. These measures will form part of a dashboard, which will be presented for scrutiny throughout the Housing Strategy period to ensure that we are on track to deliver.

Objective	Performance measure	Data source(s)	Current Performance
<b>Objective 1</b> Boosting the supply of the right homes in the right places	Number of homes with planning permission on brownfield land compared with greenfield land	Housing Annual Monitoring Report – West Yorkshire Combined Authority	38,809 (Brownfield) 17,783 (Greenfield) (2022/23)
	Number of homes completed on brownfield land compared with greenfield land	Local authority intelligence	2,780 (Brownfield) 3,254 (Greenfield) (2022/23)
	Net additional dwellings	DLUHC Live Tables and/or Land Registry (mapping)	6,382 Net Additional Dwellings (2022/23)
	Number of homes delivered within Spatial Priority Areas/ Strategic Place Partnership focus areas	West Yorkshire Combined Authority monitoring	TBC – Not yet available
	Access inequality ratio (employment) – expressed as a percentage – the number of jobs accessible in 30 minutes using the frequent bus network compares with the number of jobs accessible by car in 30 minutes from areas within the 10% most deprived in West Yorkshire, during the morning peak.	Combined Authority analysis National Travel Survey (Department for Transport)	66% (2021/22)
<b>Objective 2</b> Increasing the provision of truly affordable, accessible and adaptable homes	Affordable housing delivery	DLUHC Live Tables	1,536 Gross Affordable Dwellings Delivered (2022/23)
	Rental affordability metric	Data on rents, household income and household expenditure (various sources)	Households in PRS that cannot afford median rent: 34% (WYCA rental affordability modelling)
	Local Housing Allowance – rental affordability	Local Housing Allowance rates	See <b>Table 1</b> ( <a href="#">Page 17</a> )



		Private Rental Market Statistics – ONS	
	Number of households on local authority waiting lists	DLUHC Live Tables	84,024 households on waiting lists (2023)
	Statutory homelessness	DLUHC Live Tables	12,246 statutory homeless households on waiting lists (2022/23)
	Households in temporary accommodation	DLUHC Live Tables	1,108 households in temporary accommodation (2022/23)
	Rough sleeper count	DLUHC Rough Sleeping Snapshot Local authority intelligence	63 Rough Sleeper Count (Snapshot, 2022)
	Supported accommodation pipeline and delivery	TBC	TBC – Not yet available
<b>Objective 3</b> Improving the quality of our existing homes	Percentage of homes that meet the Decent Homes Standard	English Housing Survey modelling Local authority intelligence Stock condition surveys	79.34% meet the Decent Homes Standard (2019 Stock Modelling)
	Number of homes in the private rented sector with HHSRS hazards	DLUHC Local Authority Housing Survey Local authority intelligence Stock condition surveys	PRS properties with Category 1 Hazard(s): 21% (2019 Stock Modelling)
	EPC ratings of residential dwellings	Energy efficiency of housing data – ONS	394,000 (38%) of dwellings estimated as EPC of C or above (October 2023)
	Percentage of households in fuel poverty	BEIS statistics and West Yorkshire Combined Authority modelling	285,000 (29%) estimated of households in fuel poverty (January 2024)
<b>Objective 4</b> Creating resilient places that support the well-being of our residents	Percentage of dwellings with easy access to green space	ONS/ Natural England	23% have ‘easy’ access to greenspace (2023)
	Active travel – share of trips by mode	National Travel Survey	39.2% of trips made by walking (39%) or cycling (0.2%) (2021)
	Percentage of properties with gigabit-capable internet coverage	ThinkBroadband	85% of properties have gigabit capable internet (2023)

	Percentage of properties in flood zones	ONS/ Environment Agency	3% of residential properties in a flood zone (2023)
	Perceived risk of household crime	Crime Survey England and Wales	8.6% feel at risk of household crime (2022/23)
	Perceived risk of personal crime	Crime Survey England and Wales	1.1% feel at risk of personal crime (2022/23)

## Glossary

<b>Accessible housing</b>	Housing that enables or supports independent living for people with disabilities or illness.
<b>Active Travel</b>	Active travel refers to modes of travel that involve a level of activity. The term is often used interchangeably with walking and cycling, but active travel can also include trips made by wheelchair, mobility scooters, adapted cycles, e-cycles, scooters, as well as cycle sharing schemes.
<b>Affordability</b>	We consider affordability using the proportion of household income spent on housing costs. We have undertaken detailed modelling on rental and home purchase affordability using publicly available data and models which allow us to compare disposable income with the cost of housing. The UK government has generally viewed a housing cost to income ratio <a href="#">over 30%</a> as unaffordable, and so we have adopted that threshold in our analysis.
<b>Affordable Homes Programme</b>	The Affordable Homes Programme is funded by central government and administered by <b>Homes England</b> (see below). It provides grant funding to support the capital costs of developing affordable housing for rent or sale. The programme has existed in various iterations since 2015.
<b>Affordable housing</b>	Housing for sale or rent, for those whose needs are not met by the market as per the National Planning Policy Framework.
<b>Brownfield Housing Fund</b>	An £89million fund devolved to the West Yorkshire Combined Authority with the aim of creating more homes by bringing more brownfield land into development.
<b>Brownfield land</b>	Land which is or was occupied by a permanent structure (often also referred to a Previously Developed Land) as per the National Planning Policy Framework.
<b>Community-led housing (CLH)</b>	Housing developed by a not-for profit organisation set up and run primarily for the purpose of meeting the housing needs of its members and the wider local community, rather than being a primarily commercial enterprise.
<b>Decent home</b>	A home which complies with the <b>Decent Homes Standard</b> (see below).

<b>Decent Homes Standard</b>	<p>Sets out four criteria for a <b>decent home</b>:</p> <ol style="list-style-type: none"><li>(1) meets the statutory minimum standard for housing set out in the <b>Housing Health and Safety Rating System (HHSRS)</b>, see below);</li><li>(2) is in a reasonable state of repair;</li><li>(3) has reasonably modern facilities and services; and</li><li>(4) provides a reasonable degree of thermal comfort.</li></ol> <p>Homes provided by <b>registered providers of social housing</b> are required to meet the Decent Homes Standard by the Regulator of Social Housing. Homes provided by private landlords are not required to meet the Decent Homes Standard but are nonetheless required to meet the statutory minimum standard for housing set out in the Housing Health and Safety Rating System and are subject to duties requiring landlords to carry out repairs and safety checks.</p> <p>We use this standard within the document to compare the condition of homes across tenures and between areas.</p>
<b>Dementia-Ready Housing Taskforce</b>	<p>Our West Yorkshire Dementia-Ready Housing Taskforce brings together partners across housing, health and the community and voluntary sector to highlight the need for dementia-ready housing and services across West Yorkshire, increase awareness and understanding of dementia, challenge stigma, and work together to embed dementia-friendly criteria and building new homes.</p>
<b>Energy Performance Certificate (EPC)</b>	<p>A certificate recording a dwelling's energy efficiency rating (also known as a SAP rating), presented in an A-G banding system, where Band A rating represents low energy costs (i.e. the most efficiency band) and Band G represents high energy costs (the least efficient band). The energy efficiency rating is calculated using likely costs of space and water heating, ventilation and lighting, less cost savings from energy generation technologies (e.g. solar panels).</p>
<b>Flood Zone</b>	<p>Land which has a medium or higher probability of river or sea flooding. Flood zones are graded according to the annual probability of a flood event</p>
<b>Fuel Poverty</b>	<p>We adopt the <a href="#">National Energy Action</a> and End Fuel Poverty Coalition methodology, which considers a household to be in fuel poverty if it needs to spend 10% or more of its income on energy in order to maintain a satisfactory heating regime.</p>
<b>Future Homes Standard</b>	<p>Currently subject to consultation and implementation, the Future Homes Standard is a commitment made by central government in 2019 for new build homes to be future</p>

proofed with low carbon heating and high levels of energy efficiency.

### Historic England

Historic England is an executive non-department public body, sponsored by the Department for Culture, Media and Sport. It is central government's statutory adviser on the historic environment, championing historic places and helping people to understand, value and care for them.

### Homelessness duties

Statutory duties of local authorities to support people to prevent or relieve homelessness. Each local authority is required to consider housing needs within its area, including the needs of homeless households, to whom local authorities owe a statutory duty to provide assistance. The level of this assistance depends on whether a household meets specific legal criteria set out in homelessness legislation. For further details, see [Shelter](#) guidance.

### Homelessness or homeless household

Referable to a household that does not have a home that is available and which it is reasonable for them to occupy. It includes rough sleepers (see '**rough sleeping**' above), but also covers a much broader range of households. These households may not be without a roof over their heads, but are nonetheless threatened with the loss of, or are unable to continue occupying, their current accommodation.

### Homes England

Homes England is an executive non-departmental public body, sponsored by the Department for Levelling Up, Housing and Communities. Homes England is the government's housing and regeneration agency, and aims to accelerate the pace of house building and regeneration across the country.

### Housing First

Housing First is an intervention which supports homeless people with multiple and complex needs, which most commonly relate to co-occurring mental health issues and alcohol and/or drug misuse, to access and maintain independent housing. Housing First departs from traditional 'staircase' or 'treatment first' approaches by circumnavigating transitional forms of accommodation, for example hostels and other forms of temporary accommodation such as bed and breakfast premises, and housing people directly in independent long-term settled housing with personalised, flexible and non-time-limited support. See further [MHCLG \(2020\)](#).

### Housing Health and Safety Rating System (HHSRS)

A risk assessment tool used to assess potential risks to the health and safety of occupants in residential properties in England and Wales. There are 29 categories of hazard, each of which is separately rated, based on the risk to the potential occupant who is most vulnerable to that hazard. The individual hazard scores are grouped into 10 bands where the highest bands (A-C representing scores of 1,000 or more) are considered to pose Category 1 hazards. Local authorities have a duty to act where Category 1 hazards are

present, and may take into account the vulnerability of the actual occupant in determining the best course of action.

### **Local Housing Allowance**

Local Housing Allowance (LHA) rates are used to calculate the level of Housing Benefit or Universal Credit (Housing Costs Element) for tenants renting from private landlords. LHA rates are decided by the Department for Work and Pensions using information on rent levels in the local area provided by the Valuation Office Agency (VOA). The level of benefit paid to people in receipt of Housing Benefit or Universal Credit (Housing Costs Element) is currently set at the 30th percentile of rents in the local area, which means it should cover the lower 30% of rents, and is based on the number of bedrooms the claimant is entitled to. Since April 2012, LHA rates have not always been linked to changing market prices and have been subject to different uprating decisions and freezes.

### **Mass Transit**

A large-scale public transport system which usually connects cities and suburban areas. Typically, mass transit would use one or more modern high-capacity bus, tram or tram-train type vehicles.

### **Modern Methods of Construction (MMC)**

An umbrella term used broadly to describe contemporary innovations in construction, including new technologies (such as digital tools and techniques), offsite manufacture and use of efficient processes to deliver better economic, environmental and social outcomes.

### **Non-decent home**

A home which fails to comply with the **Decent Homes Standard** (see above).

### **People Powered Homes**

People Powered Homes is the **community-led housing** (see above) enabler hub for West & South Yorkshire, supporting groups through the process of creating the homes that their communities need. It provides support through national and local policy work and network, to create and support an environment which leads to more community-led housing.

### **Retrofit (domestic)**

Works undertaken to improve the thermal efficiency and air tightness and/or installing renewable technologies where appropriate.

### **Right to Buy**

A central government scheme which allows most tenants of **local authority registered providers of social housing**, as well as some tenants of **private registered providers of social housing**, to buy their home at a price lower than the full market value based on the length of time they have spent at a tenant.

### **Rough sleeping**

Rough sleepers are [defined by central government](#) as people sleeping, about to bed down, or actually bedded down in the open air (such as on the streets, in tents, doorways, <sup>124</sup> parks, bus shelters or encampments). People in

buildings or other places not designed for habitation (such as stairwells, barns, sheds, or cars) are also considered to be rough sleepers. The definition does not include people in hostels or shelters, people on campsites, squatters or travellers.

### **Self-Build**

Housing built by an individual, a group of individuals or persons working with or for them to be occupied by that individual as per the National Planning Policy Framework.

### **Small and Medium Enterprises (SMEs)**

An organisation that has fewer than 250 employees and a turnover of less than £25 million.

### **Social housing provider or registered provider of social housing**

Social homes can be provided by a **local authority registered provider** (often known as ‘council housing’) or a **private registered provider of social housing** (which includes ‘housing associations’). Social homes are usually rented at a below-market rent or on a shared ownership basis. Providers of social housing must be registered with the Regulator of Social Housing.

### **Spatial Priority Area (SPA)**

The largest and/or most strategic growth opportunities across West Yorkshire, agreed with local authorities.

### **Strategic Place Partnership**

A collaboration agreement between West Yorkshire Combined Authority and Homes England which sets out our joint objectives for the region and strategic housing-led development projects aligned to Spatial Priority Areas.

### **Temporary Accommodation**

If a local authority owes (or is considering whether they owe) a household a **homelessness duty** (see above), they may be placed in temporary accommodation pending the completion of inquiries into an application, or they might spend time waiting in temporary accommodation after an application is accepted until suitable secure accommodation becomes available.

### **Tenure**

In this strategy, households are typically grouped into three broad categories known as tenures: owner occupiers, social renters and private renters. The tenure defines the conditions under which the home is occupied, whether it is owned or rented, and if rented, who the landlord is and on what financial and legal terms the let is agreed.

### **West Yorkshire Health and Care Partnership**

The West Yorkshire Health and Care Partnership is an [‘Integrated Care System’](#). It works in partnership with NHS organisations, councils, Healthwatch, hospices, charities and the community, voluntary and social enterprise sector to improve the health and well-being of people living in West Yorkshire (including Craven).

### **West Yorkshire Housing Partnership (WYHP)**

A partnership of housing associations operating in West Yorkshire.

### **West Yorkshire Integrated Care Board**

The West Yorkshire Integrated Care Board (ICB) is part of the **West Yorkshire Health and Care Partnership**. The role of the ICB is to arrange the provision of a comprehensive universal health service for all residents and people who require treatment in West Yorkshire. They manage the NHS budget and work with local providers of NHS services, such as hospitals and GP practices, to agree how they will contribute to the strategy set by the West Yorkshire Health and Care Partnership.



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**West  
Yorkshire  
Combined  
Authority**

**Tracy  
Brabin  
Mayor of  
West Yorkshire**

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<b>Report to:</b>	The West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Rail Strategy</b>
<b>Director:</b>	Simon Warburton, Executive Director for Transport
<b>Author:</b>	Rebecca Cheung, Lead Policy Manager (Public Transport)

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To update the Combined Authority on the outcome of the public consultation of the emerging Rail Strategy.
- 1.2 To seek the Combined Authority's approval of the Rail Strategy Executive Summary and Rail Strategy full document.

## 2. Information

### Background

- 2.1 The Combined Authority has a statutory duty to produce and keep under review a Local Transport Plan (LTP) on behalf of West Yorkshire. A new Local Transport plan for West Yorkshire is currently being produced, reflecting the significant development in local and wider city region transport policy that has followed since 2017. It will focus on where change is most needed to deliver the strategic ambition of the West Yorkshire Plan. One of the key actions for change outlined in the West Yorkshire Plan is to develop an integrated, affordable, sustainable, reliable and resilient transport system that connects all parts of our region, so everyone can access the places they need to live fulfilled lives, boosting productivity, increasing innovation, and creating jobs.

- 2.2 The rail network plays an important part in the lives of the people and the businesses of West Yorkshire, connecting our towns and cities together and linking our region to the rest of the North. In 2021, the Combined Authority consulted on the draft Rail Vision as part of our Connectivity Infrastructure Plan engagement. The objectives set out in the Rail Vision were strongly supported by those who replied to the engagement survey, with around 80% of respondents saying they fully or partly support the Rail Vision. The Rail Vision put the rail network at the core of a fully integrated transport system of public transport, cycling and walking which is attractive and conveniently accessible to everyone.
- 2.3 Based on the feedback of the Rail Vision, we have developed our Rail Strategy. The purpose of the Rail Strategy is to provide a coherent, formally established, local rail policy:
- to support securing and prioritising funding.
  - to align policies, decision making and investment and link them to our region's economic objectives.
- 2.4 It will serve as a regional evidence base and policy position for local partners and industry stakeholders to use as a basis for making the case for investment in our rail network, as and when funding opportunities become available.
- 2.5 The Rail Strategy sets out the Combined Authority's priorities, the next steps and interventions required to deliver the Rail Vision for West Yorkshire up to 2050. It looks at how we can address the urgent issues impacting the railways, such as frequency, capacity and passenger experience. It also looks at our priorities for the development of the rail network, transforming national and regional rail connectivity and ensuring there is adequate capacity for increased freight on the railways. The Rail Strategy will form a key supplementary document that underpins the new Local Transport Plan (LTP4).
- 2.6 The Rail Strategy has identified 4 key priorities with an implementation plan supporting the delivery of these priorities. The priorities are:
- Delivery capacity for growth
  - Improving station facilities and train services
  - Decarbonisation
  - Increasing capacity for freight



## Rail Strategy Public Consultation

- 2.7 Between 12 June 2023 to 3 September 2023, the Combined Authority carried out a period of statutory consultation to gather feedback on the emerging Rail Strategy. Statutory consultees and other stakeholders with an interest in rail were asked to share their views on the updated document, which was hosted on a dedicated page on the [Your Voice digital engagement hub](#) and was promoted on a range of channels including social media, press releases, and emails to statutory and key stakeholders. The consultation was also open to the general public.
- 2.8 Overall, 174 responses were received, of which 46 were from organisations (15 statutory consultees and 31 non-statutory) and 128 from individuals.
- 2.9 All survey respondents were asked to indicate their level of support for the Rail Strategy. 91% of respondents said they fully or partly support the Rail Strategy and 63% of respondents indicated their full support. The Rail Strategy Consultation Outcome report is linked to this report at point 12.
- 2.10 The key themes of the consultation feedback are summarised as follows:
- Recognition of the importance of Rail for West Yorkshire and the importance of this Rail Strategy, and the poor nature of the existing rail offer in the region.
  - Strong support for more integration, particularly with buses as the other predominant form of public transport, but with all other modes including cycling and walking.
  - Importance of electrification within the region, in particular on a couple of already identified key corridors such as the Calder Valley Line.
  - A lot of support for the Rail Strategy's focus on decarbonisation, the environment, and encouraging modal shift.
  - Suggestions of further methods of integration such as fare integration, a simplified fare structure, clockface scheduling, and further integration with proposed mass transit for the future.
  - Importance of improving stations, particularly around accessibility, passenger experience, and retaining physical ticket offices.
  - A strong focus on reopening old lines and support for a range of new or reopened stations.
  - A demand for schemes to start sooner and for more detail around delivery times.
  - A request for continued engagement with statutory and key stakeholders.

### Response to the Consultation Feedback and Next Steps

- 2.11 All written comments have been considered by the Combined Authority. Based on the feedback received, we have strengthened some of the wording in the Rail Strategy particularly around rolling stock and decarbonisation.
- 2.12 Following the public consultation, in October 2023 the government published the Network North proposals. While the Government's 2021 Integrated Rail Plan and 2023 Network North made beneficial commitments to invest in the railway including Transpennine Route Upgrade, Leeds – Sheffield and Leeds – Hull electrification plus a new Bradford station with a link to Huddersfield, these commitments are not enough to deliver the investment required to support our region's economy and our commitment to decarbonisation. Reflecting on the Network North announcement, amendments have been made to the wording of the Rail Strategy and we have set out our requirements beyond Network North. The Combined Authority is keen to progress the following key priorities of the region which are currently not included in the Network Rail or the Integrated Rail Plan:
- Development and agreement of a solution to resolve rail capacity at Leeds station which includes a new revised T-shaped station and land to remain safeguarded until a solution is agreed.
  - Exploring options and next steps to improve connectivity between West / South Yorkshire and the East / West Midlands, now extending HS2 services to Leeds is no longer an option.
  - Agreeing a way forward to progress a rolling programme of electrification including Calder Valley line and Harrogate Line electrification. Our rail strategy identifies electrifying the Calder Valley line as a key priority for the region and a logical next step build on the IRP electrification proposals between Leeds and Bradford Interchange and also to provide an electrified diversionary route to the TransPennine route.
  - Seeking further funding to deliver a half-hourly service between Huddersfield and Barnsley.
- 2.13 The latest version of the Executive Summary and the full Rail Strategy are linked to this report at point 12. Both documents are welcomed and endorsed by the Transport Committee at its meeting on 29 January 2024.
- 2.14 During the consultation, we received a large number of responses making suggestions and recommendations for potential changes to existing rail service patterns and/or potential new services on the existing network. These comments are extremely helpful, however, this level of detail and specificity cannot be covered within the Rail Strategy itself and, in some cases, there may be several potentially sound options to deliver the outcomes required. All of the specific suggestions received are greatly appreciated by

the Combined Authority, have been read in detail and will be used to inform the potential concrete options for delivering our priorities for improved connectivity. It is notable that the proposals received are very much in line with the Rail Strategy's overall objectives in terms of frequency and connectivity. We also received helpful comments about integration and fares, these are crucial elements of an integrated transport system which will be covered in further work as part of the Local Transport Plan.

- 2.15 The Frequently Asked Questions will be updated to provide answers to feedback which cannot be fully addressed in the Rail Strategy document.

### **3. Tackling the Climate Emergency Implications**

- 3.1 A reliable and robust local, regional and national rail network with appropriate investment will help to provide an attractive alternative for road transport which will help tackling climate emergency and protect our environment.

### **4. Inclusive Growth Implications**

- 4.1 The principle of inclusive growth is central to the emerging Rail Strategy to ensure that there is a strong focus on local connectivity particularly in hard to reach and economically deprived areas where the rail offer is in need of modernisation.

### **5. Equality and Diversity Implications**

- 5.1 Ensuring an effective, stable and affordable public transport network is key for equality and diversity. Equality and diversity are the key objectives for the Rail Strategy. An Equality Impact Assessment has also been completed for the emerging Rail Strategy.

### **6. Financial Implications**

- 6.1 There are no financial implications directly arising from this report. The development and implementation of the rail priorities will require further financial commitment and the financial implications will be set out in subsequent reports at a later stage.

### **7. Legal Implications**

- 7.1 There are no legal implications directly arising from this report.
- 7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the West Yorkshire Business Board (LEP) Combined Authority Member and the Non-Constituent Council Combined Authority Member.

### **8. Staffing Implications**

- 8.1 The implementation of the rail priorities identified in the Rail Strategy will be through our existing resource in Rail Policy, Passenger Services and Delivery Teams.

## **9. External Consultees**

- 9.1 District officers, members, rail industry and Transport for the North have been consulted during the development of the Rail Strategy. A public consultation has been completed for the emerging Rail Strategy.
- 9.2 The latest Rail Strategy and Rail Strategy executive summary were considered and endorsed by the Transport Committee at its 29 January 2024 meeting.

## **10. Recommendations**

- 10.1 That the Combined Authority notes the outcome of the Rail Strategy public consultation.
- 10.2 That the Combined Authority approves the Rail Strategy Executive Summary and Rail Strategy full document for them to be adopted as the rail policy for West Yorkshire.

## **11. Background Documents**

There are no background documents referenced in this report.

## **12. Appendices**

Appendix 1 – [Rail Strategy Executive Summary](#)

Appendix 2 – [Rail Strategy Consultation Outcome Report Executive Summary](#)

Appendix 3 – [Rail Strategy Full Document](#)

<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Local Transport Plan</b>
<b>Director:</b>	Simon Warburton, Executive Director Transport
<b>Author:</b>	James Nutter, Lead Policy Manager Transport Strategy

Is this a key decision?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To approve an eight week public and stakeholder engagement exercise in June and July 2024 on the proposed vision, objectives and overall approach to the new West Yorkshire Local Transport Plan.
- 1.2 To delegate finalisation of the engagement documents to the Executive Director Transport following input from the Transport Committee in May 2024.

## 2. Information

### Background – Local Transport Plan Renewal

- 2.1 A new West Yorkshire Local Transport Plan (LTP) is being co-developed by the Combined Authority and District partners. This will be the new statutory LTP for the region, the last plan being the Transport Strategy 2040 adopted in 2017.
- 2.2 Since the current LTP was adopted in 2017, a lot has changed in West Yorkshire. A devolution deal was agreed with government in 2020 and in May 2021, Tracy Brabin was elected Mayor of West Yorkshire, with responsibility for transport, housing and planning, and finance powers. A number of key plans have also been developed including the West Yorkshire Plan, Mass Transit Vision, Bus Service Improvement Plan, Local Cycling

and Walking Infrastructure Plan and Rail Strategy, as well as the Climate and Environment Plan 2021-2024.

- 2.3 Transport Committee at its meeting in February 2023 approved the development of a new West Yorkshire Local Transport Plan, and subsequently at its meeting in January 2024, endorsed a two-stage approach to engagement and consultation.
- 2.4 Following the finalisation of legal advice, the following is proposed by way of engagement and consultation on the LTP:
- **Stage 1: Engagement exercise**  
*Timing: June – July 2024*  
*Duration: 8 weeks*  
*Audience: Public/stakeholders*  
*Scope: Vision, objectives and overall approach*
  - **Stage 2: Formal consultation**  
*Timing: Spring/Summer 2025*  
*Duration: 12-13 weeks*  
*Audience: Public/stakeholders*  
*Scope: The full text of the draft LTP i.e. the ‘preferred LTP’*
- 2.5 Approval for the stage 1 engagement exercise is being sought through this paper.

#### Renewing the LTP Vision

- 2.6 As part of the process of renewing the LTP, the vision for transport across West Yorkshire is being renewed. To support this activity, a high-level document is being developed which will be used to engage with stakeholders and the public. This document is being co-developed in partnership with district partners. This is to ensure that collective ambitions are reflected and that partners are content with the material. Transport Committee are supporting the development of this material.
- 2.7 The proposed LTP vision statement is strongly aligned to and is subsidiary to the recently adopted West Yorkshire Plan, which identifies that transport is a crucial component in supporting our vision for a brighter West Yorkshire: – *‘Our vision for the future is rooted in our region’s extraordinary story. A brighter West Yorkshire – a place that works for all. An engine room of ideas and creativity where anyone can make a home’*. The LTP vision statement is underpinned by the West Yorkshire Plan missions which include;
- A prosperous West Yorkshire built on an inclusive economy with well-paid jobs.
  - A happy West Yorkshire, full of great places and healthy communities.
  - A well-connected West Yorkshire, held together by a strong transport system.
  - A sustainable West Yorkshire, rich with greener lives and communities.
  - A safe West Yorkshire, free of the fear of crime so everyone can flourish.

2.8 The proposed vision will be supported by a set of network principles that enable the development of a better, more efficient and affordable transport network. West Yorkshire's transport network should be oriented around the real wants and needs of the people who live here and businesses who operate here. So everyone can all benefit from it together.

2.9 **Spatial Themes:** The proposed approach to the new LTP is to deliver an integrated transport network where everyone can easily choose a sustainable option. All helping to create a more joined up, properly connected West Yorkshire community, with greatly improved links to destinations beyond West Yorkshire, a network that brings people together, provides access to opportunity and reduces isolation and inequality.

Understanding the different types of journeys, and the modes that are most suitable for them, as well as the different contexts of the places where these trips will be undertaken, is a really important element of an effective integrated transport network. It is proposed that the engagement exercise in June – July 2024 also includes the opportunity for stakeholder and public feedback on a spatial approach to the development of a new LTP. This will use the following potential journey themes (northern, national and international journeys, inter – urban journeys, radial journeys and local journeys).

2.10 **Place Based approach:** How the new LTP responds to our diverse communities and geography, is a key element in helping to ensure the proposed new vision is one we can collectively support across West Yorkshire. Spatial analysis that covers each Local Authority in West Yorkshire will be utilised. The Plan will need to recognise that some places are harder or more expensive to get to by public transport in West Yorkshire than they should be right now, and that transport solutions are likely to look and feel different in more rural areas than towns and cities. It is proposed that the engagement exercise also includes the opportunity for stakeholder and public feedback on the importance of place within the LTP.

2.11 Development of the engagement documents for the exercise in June and July 2024 will take place with input from Transport Committee. Approval is sought from the Combined Authority to delegate finalisation of the documents to the Executive Director Transport.

### 3. Tackling the Climate Emergency Implications

3.1 One of the aims of the updated West Yorkshire LTP is to help facilitate the decarbonisation of the transport sector, as well as encourage more travel by walking, cycling, bus and other sustainable modes in order to help tackle the climate emergency.

### 4. Inclusive Growth Implications

4.1 One of the key aims of the updated West Yorkshire LTP will be to improve connectivity and support the region's inclusive growth ambitions.

## **5. Equality and Diversity Implications**

- 5.1 Reaching diverse groups and communities is central to the engagement objectives and marketing activity. This will include reaching all the West Yorkshire districts we serve with a particular focus on EDI. The engagement content needs to reflect and talk to these diverse groups. We will do everything we can to alleviate any barriers that could prevent a person taking part in the engagement activities. Demographic information will be monitored throughout to strengthen insight to support equity, diversity and inclusion. Any gaps in response rates or low proportional response rates will be identified, and promotional and engagement methods adapted to reach those groups. The outcome report produced at the end will demonstrate how the voices of groups with protected characteristics or those communities who are seldom heard, are being represented in the decision-making process.

## **6. Financial Implications**

- 6.1 There are no financial implications directly arising from this report.

## **7. Legal Implications**

- 7.1 Legal advice on the proposed route to adoption for the new LTP has been obtained. This has informed the two-stage approach to engagement and consultation.
- 7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

- 8.1 There are no staffing implications directly arising from this report.

## **9. External Consultees**

- 9.1 No external consultations have been undertaken.

## **10. Recommendations**

- 10.1 That the Combined Authority approves an eight week public and stakeholder engagement exercise in June and July 2024 on the proposed vision, objectives and overall approach to the new West Yorkshire Local Transport Plan.
- 10.2 That the Combined Authority delegates finalisation of the engagement documents to the Executive Director Transport following input from the Transport Committee in May 2024.



**11. Background Documents**

There are no background documents referenced in this report.

**12. Appendices**

None.

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<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Economic Strategy</b>
<b>Director:</b>	Felix Kumi-Ampofo, Director Inclusive Economy, Skills and Culture
<b>Author:</b>	Jo Barham, Policy Manager

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To update members of the Combined Authority on the development of a new Economic Strategy for West Yorkshire.

## 2. Information

### Background

- 2.1 West Yorkshire needs a new Economic Strategy to deliver on the vision and missions of the West Yorkshire Plan. This is a regional strategy and is being developed in partnership with the five West Yorkshire local authorities and several other partners. It provides a regional framework that aligns to district plans and strategies as well as northern, national, and international opportunities.
- 2.2 Producing the Economic Strategy has involved a wide-ranging programme of evidence collection and engagement. Work has included an external research commission on West Yorkshire sector strengths, a public consultation, and engagement with the academic evidence base of West Yorkshire Universities. A comprehensive economic assessment considering the key drivers of productivity in West Yorkshire has been undertaken and will be published on the Combined Authority webpage before the pre-

election period. Appendix 1 to this report provides a summary of the evidence collection that has taken place, and the emerging priorities.

### Productivity

- 2.3 The analysis considers the overall performance of the West Yorkshire economy over the past 20 years, exploring the economic geography and local specialisms of the region. The evidence shows a **resilient, diversified, and polycentric economy that nevertheless has struggled to keep pace with national growth and productivity**. This has had an adverse effect on living standards.
- 2.4 West Yorkshire's diverse economy has deep pockets of specialisation. There are positive examples of manufacturing specialisms with above average productivity alongside knowledge-based specialisms where productivity improvements are needed. These specialised clusters provide an opportunity for productivity growth. West Yorkshire can be said to be a largely self-contained labour market with around 90% of people working in the region also living in the region.
- 2.5 Major drivers of West Yorkshire's poor productivity performance are levels of skills and investment and also connectivity. Higher-level skills and employer reported skill shortages are holding back economic growth.

### Poverty

- 2.6 More than one in five people in West Yorkshire live in areas within the 10% most deprived in England, according to the Index of Multiple Deprivation (IMD), many of these areas are in towns and cities that despite having high levels of productivity do not translate to benefits for residents.
- 2.7 Poor health plays a role in the underperformance of the West Yorkshire economy with healthy life expectancy below the national average for both males and females. Around 350,000 people are economically inactive in West Yorkshire (160,000 of this is due to sickness or caring responsibilities) driving an employment gap with the national average particularly for women and ethnic minority groups.

### Opportunity

- 2.8 School performance is especially weak for learners who qualify for Free School Meals (FSM) and progression into Higher Education is below the national average. Young people not in education, employment or training (NEET) face an increased likelihood of unemployment, low wages, or low-quality work later on in life. The proportion of young people who are NEET in West Yorkshire increased between 2021/22 and 2022/23 and is above the national average.

## **Next steps**

- 2.9 The next stage of this work is focused on the development of a framework and set of priorities for action. Draft priorities are being discussed with Combined Authority committees and will be refined into a summary for consultation after the local elections. A panel of independent experts is providing impartial advice on the evidence base and emerging priorities and a webpage with reporting and evidence will be available. The final Economic Strategy document will be published in the late summer / early Autumn.

### **3. Tackling the Climate Emergency Implications**

- 3.1 Tackling the Climate Emergency is a driving theme for the Economic Strategy and a core principle reflected in the emerging conceptual framework.

### **4. Inclusive Growth Implications**

- 4.1 Inclusive Growth is a driving theme for the Economic Strategy and a core principle reflected in the emerging conceptual framework.

### **5. Equality and Diversity Implications**

- 5.1 Equality and Diversity is a driving theme for the Economic Strategy and a core principle reflected in the emerging conceptual framework.

### **6. Financial Implications**

- 6.1 There are no financial implications directly arising from this report.

### **7. Legal Implications**

- 7.1 There are no legal implications directly arising from this report.
- 7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

### **8. Staffing Implications**

- 8.1 There are no staffing implications directly arising from this report.
- 8.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **9. External Consultees**

- 9.1 A questionnaire distributed via the Your Voice tool has been analysed with feedback helping to shape the emerging areas for action set out in Appendix 1.

## **10. Recommendations**

- 10.1 That members of the Combined Authority note the progress update and provide any comments on the approach and content.

## **11. Background Documents**

There are no background documents referenced in this report.

## **12. Appendices**

[Appendix 1 – Economic Strategy Summary Pack](#)

# West Yorkshire Economic Strategy:

Update for Combined Authority

West Yorkshire Economic Strategy: draft policy in development



# A New Economic Strategy to deliver the West Yorkshire Plan

Devolution provides a historic opportunity for West Yorkshire. Now is the time for a new Economic Strategy to deliver the vision and the missions of the West Yorkshire Plan.

Working collaboratively, the Economic Strategy will take a whole systems approach to tackle long-term, systemic and complex issues facing our region.

**Our Partnership:** this is a regional strategy and is being developed in partnership with the five West Yorkshire local authorities. It provides a regional framework that aligns to district plans and strategies as well as northern, national, and international opportunities.

### The West Yorkshire 2040 Vision and missions

**Our vision:**  
A brighter West Yorkshire – a place that works for all.  
An engine room of ideas and creativity, where anyone can make a home.

Our vision and missions put equity, diversity, and inclusion at the heart of everything we do. We will lead the way to embed these values across all our work.

**The West Yorkshire Plan includes:**

- The West Yorkshire story – our region’s unique identity
- The future of West Yorkshire – our vision and missions for 2040
- Working together – our partnerships for change

- Mission 1:**  
A prosperous West Yorkshire – an inclusive economy with well paid jobs
- Mission 2:**  
A happy West Yorkshire – great places and healthy communities
- Mission 3:**  
A well-connected West Yorkshire – a strong transport system
- Mission 4:**  
A sustainable West Yorkshire – making lives greener
- Mission 5:**  
A safe West Yorkshire – a region where everyone can flourish



# The Challenge

**Entrenched, generational and a significant constraint to inclusion and prosperity.**

West Yorkshire's productivity growth has not kept pace with the rest of the UK. This is impacting on living standards across the region.

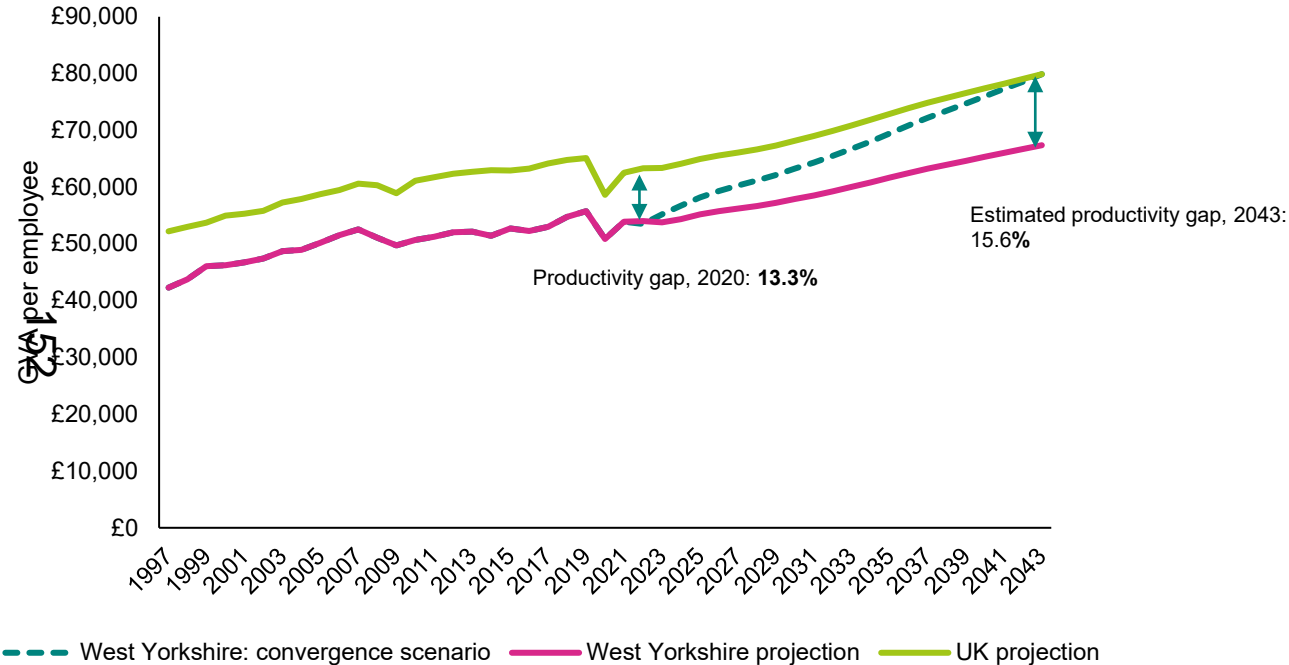
Longstanding deprivation, economic inactivity and health inequality is holding back economic growth.

Too many people in the West Yorkshire workforce do not have the qualifications and skills they need to reach their full potential.

# Productivity growth is underperforming.

Figure: GVA performance and projections, UK and West Yorkshire (1997-2043)

## Productivity scenarios



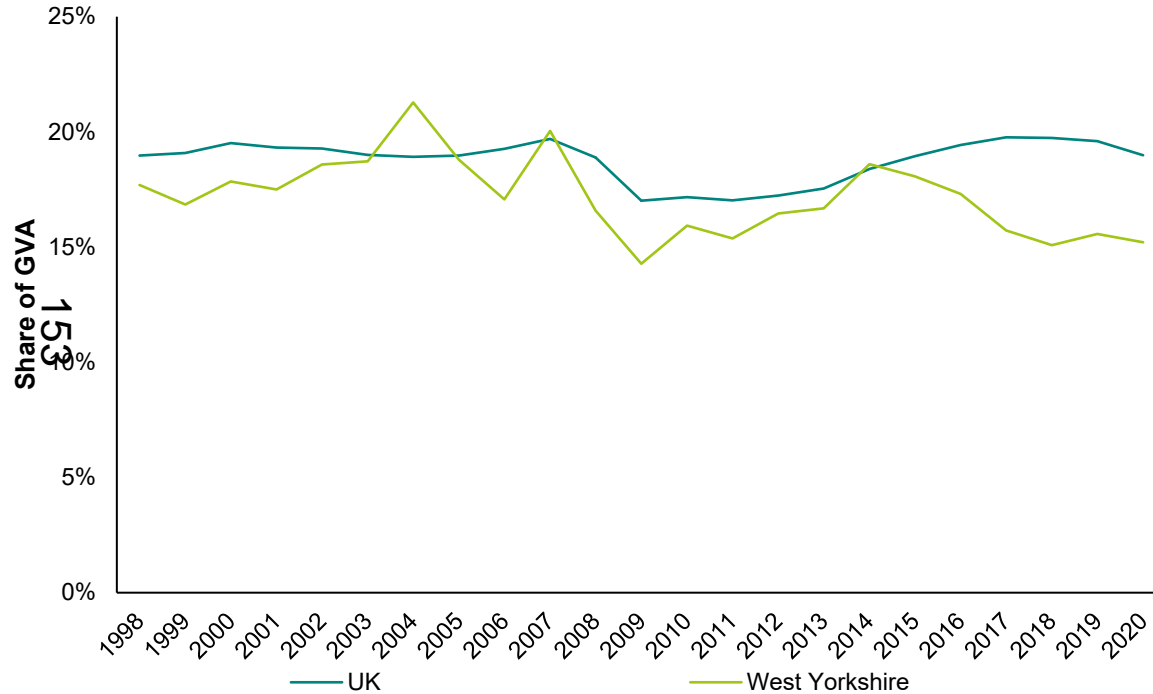
- West Yorkshire is underperforming the (already low) national average.
- Projections suggest the productivity gap will widen in the next two decades.
- Closing the productivity gap by 2043, would mean GVA growing at 2.3 per cent a year **leading to an economy £15bn larger than projected and £38bn larger than today.**
- Closing the productivity gap with the UK average would align West Yorkshire with second-tier cities in international comparators.

Source: Experian, West Yorkshire Combined Authority REM.

# West Yorkshire's investment and skills pipeline is diverging from UK average

**Figure:** Investment at the subnational by ITL2 (1998-2020)

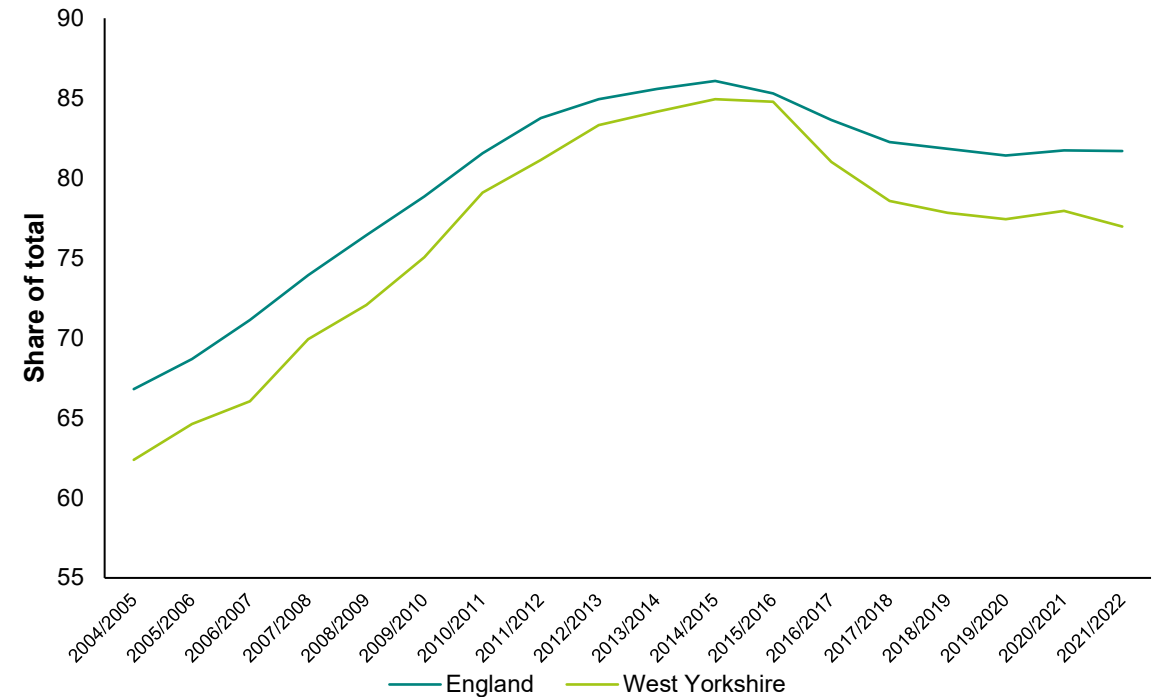
## Gross Fixed Capital Formation share of GVA



Source: ONS, Experimental regional gross fixed capital formation (GFCF) estimates by asset type: 1997 to 2020. ONS, GVA at ITL2, current price estimates: 1998 to 2020.

**Figure:** Share of who achieve level 2 and level 3 by the age of 19 (2004/05 and 2021/22)

## Who achieve level 2 by age of 19



Source: DfE, Level 2 attainment age 16 to 25, Academic year 2021/22.

# Economic Enablers Holding back Productivity

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**Connectivity is constraining West Yorkshire's economic activity** and investment in transport infrastructure has not kept pace with need:

- Average commuting times have been increasing overtime. Congestion in Leeds is much higher than international peers in more productive second-tier cities.
- Sectors that are expected to play an important role in closing the productivity gap, like advanced manufacturing or professional services, report higher dissatisfaction with connectivity than average.

<sup>154</sup> There are pockets of **Digital Connectivity underperformance**, particularly in rural areas of Calderdale.

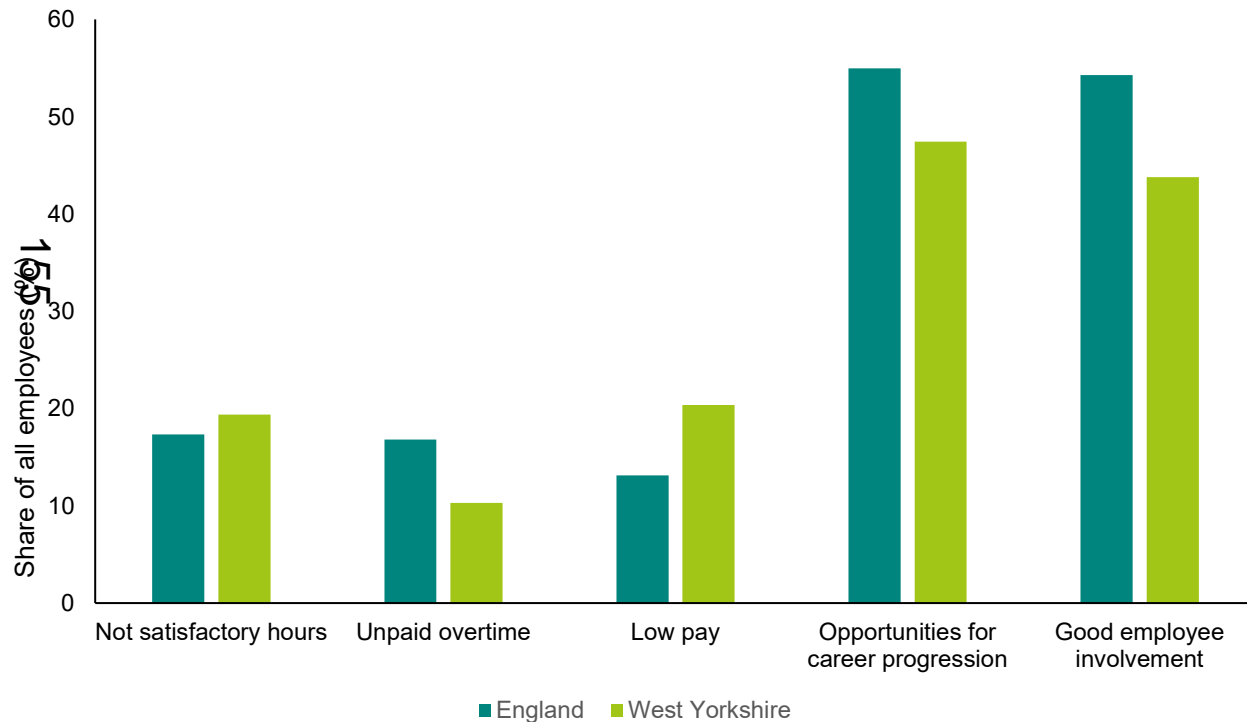
Despite levels being lower than the national average, **house prices and rents have been rising faster than the national average.**

The Economic Strategy aligns to key strategic enablers demonstrated in ongoing policy work to develop:

- A Local Transport Plan
- Housing Strategy
- Digital Blueprint.

# Lack of desired hours and progression opportunities are higher in West Yorkshire than in England

Figure: Job quality indicators, January to December 2021

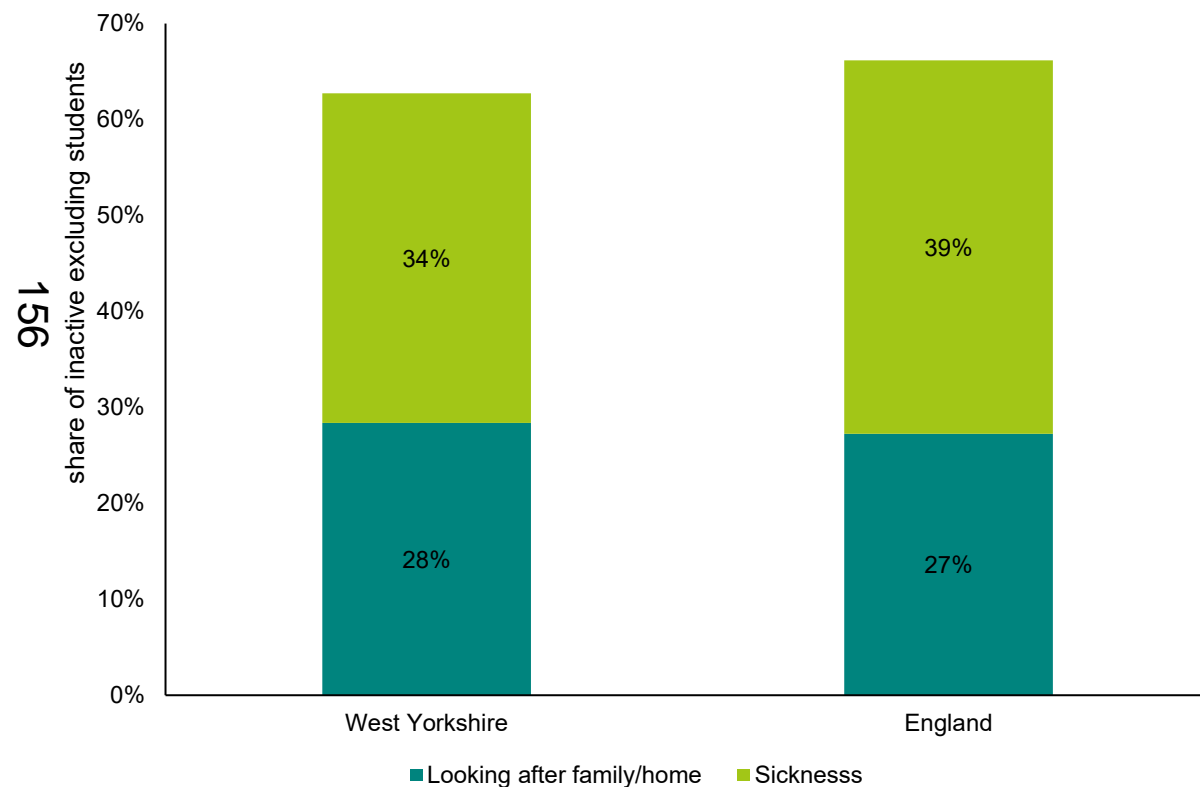


- Part time work is more prevalent for workers with lower qualifications, which limits income earned by workers.
- This may be a choice, but research suggests the the gap between male and female part-time rates is driven by caring responsibilities.
- The UK has one of the highest childcare costs in the [OECD](#).
- Working towards improving childcare is likely to promote income gains at the bottom of the income distribution and allow West Yorkshire to make the most out of its talent.

Source: Jobs quality indicators in the UK - hours, pay, contracts, opportunities, and involvement: 2021, Office for National Statistics. West Yorkshire figures estimated using local authority statistics and weighted them using the number of employees provided by Business Register and Employment Survey (BRES).

# A large share of inactivity due to sickness and caring responsibilities

**Figure:** Share of economic inactive (excluding students) by reason of inactivity, Oct 2022-Sep 2023



- There are around 250,000 people classified as inactive in West Yorkshire (excluding students).
- From those, almost two thirds are inactive due to sickness or looking after family/home.

# The Opportunity

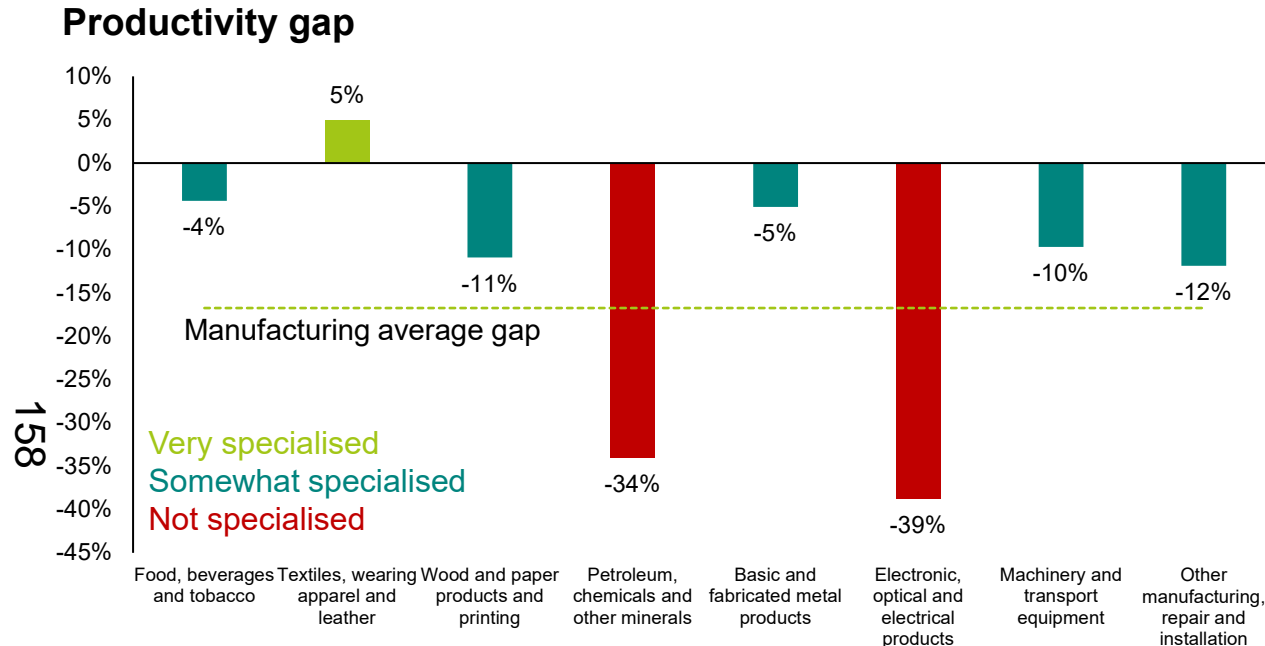
157

West Yorkshire's diverse economy has pockets of specialisation spread across the region. There are positive examples of manufacturing specialisms with above average productivity, alongside knowledge-based specialisms where productivity improvements are needed.

These specialised clusters and emerging sectors demonstrate the potential for productivity growth. West Yorkshire is a self-contained labour market, so these specialisms provide opportunity for people across the region.

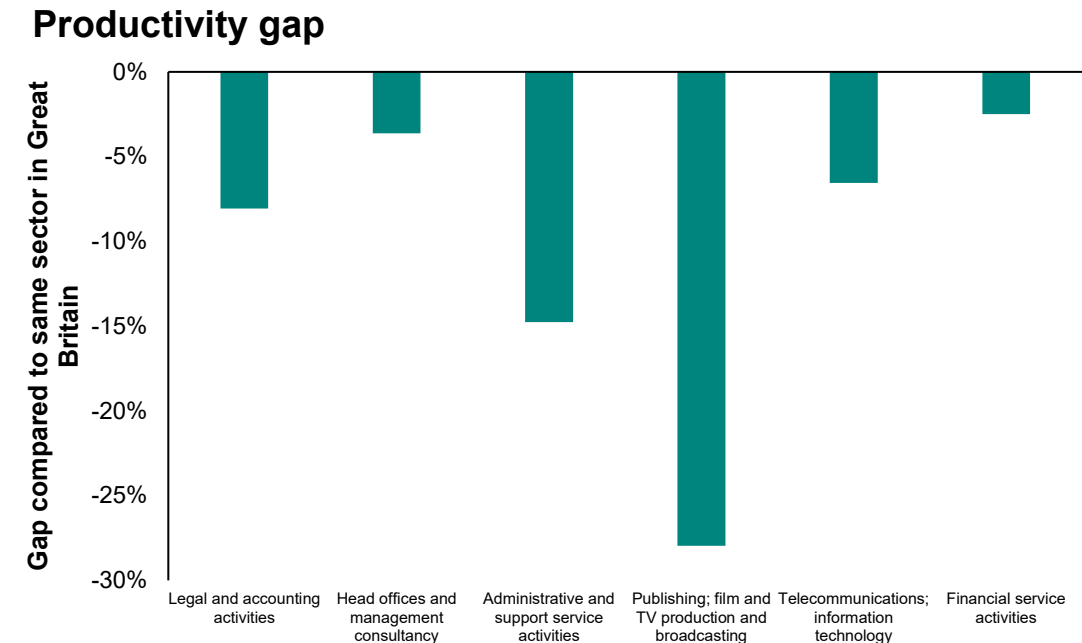
# Closing the productivity gap will require new manufacturing specialisms in West Yorkshire and a deepening of existing specialisms in Leeds

Figure: Manufacturing productivity by ITL3 and industry, West Yorkshire 2019



Source: ONS, Regional gross value added (balanced) by industry: all ITL regions. ONS, Business Register and Employment Survey.

Figure: Services productivity in Leeds by its specialisms, 2019



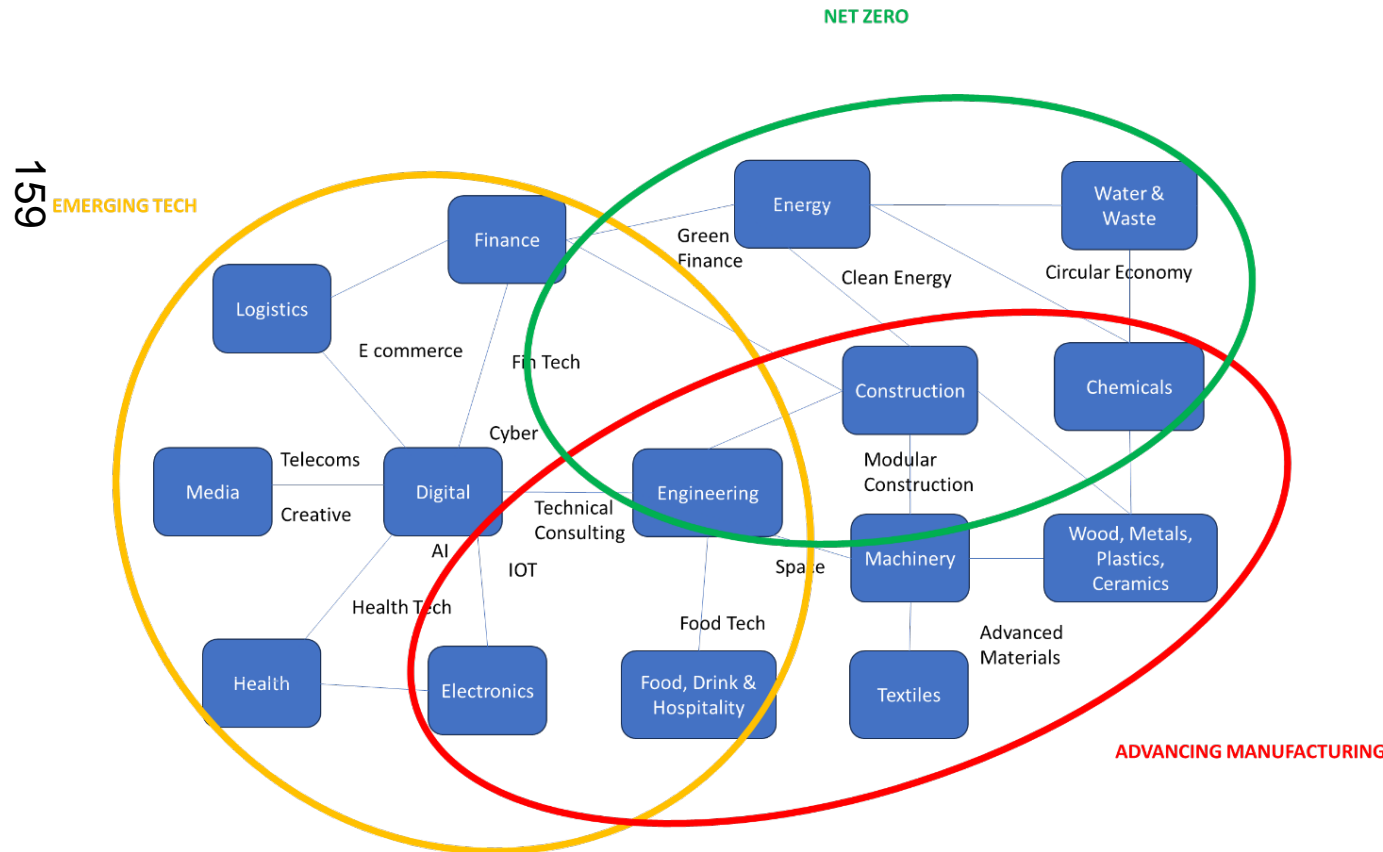
- Leeds underperforms in the services that it has a specialism. Closing the productivity gap requires making those sectors more productive. By attracting new businesses in these sectors and enabling the benefits of agglomeration.

- The main productivity differences are in sectors **in which West Yorkshire is not specialised**. The productivity gap is small in areas that West Yorkshire is specialised. The gap is driven by the absence of specialisms in highly productive industries like electronics (electric lighting equipment vs. electronic components) and chemicals (agrochemicals vs. pharma and petroleum).
- Closing the **productivity gap will require new manufacturing-related specialisms**. Closing (or widening) the gap in existing specialisms may not be enough.



# Sector Strengths – cluster analysis

Cambridge Econometrics is leading on a cluster analysis study to understand the sectors where West Yorkshire has comparative advantage and the implications for inclusive growth.

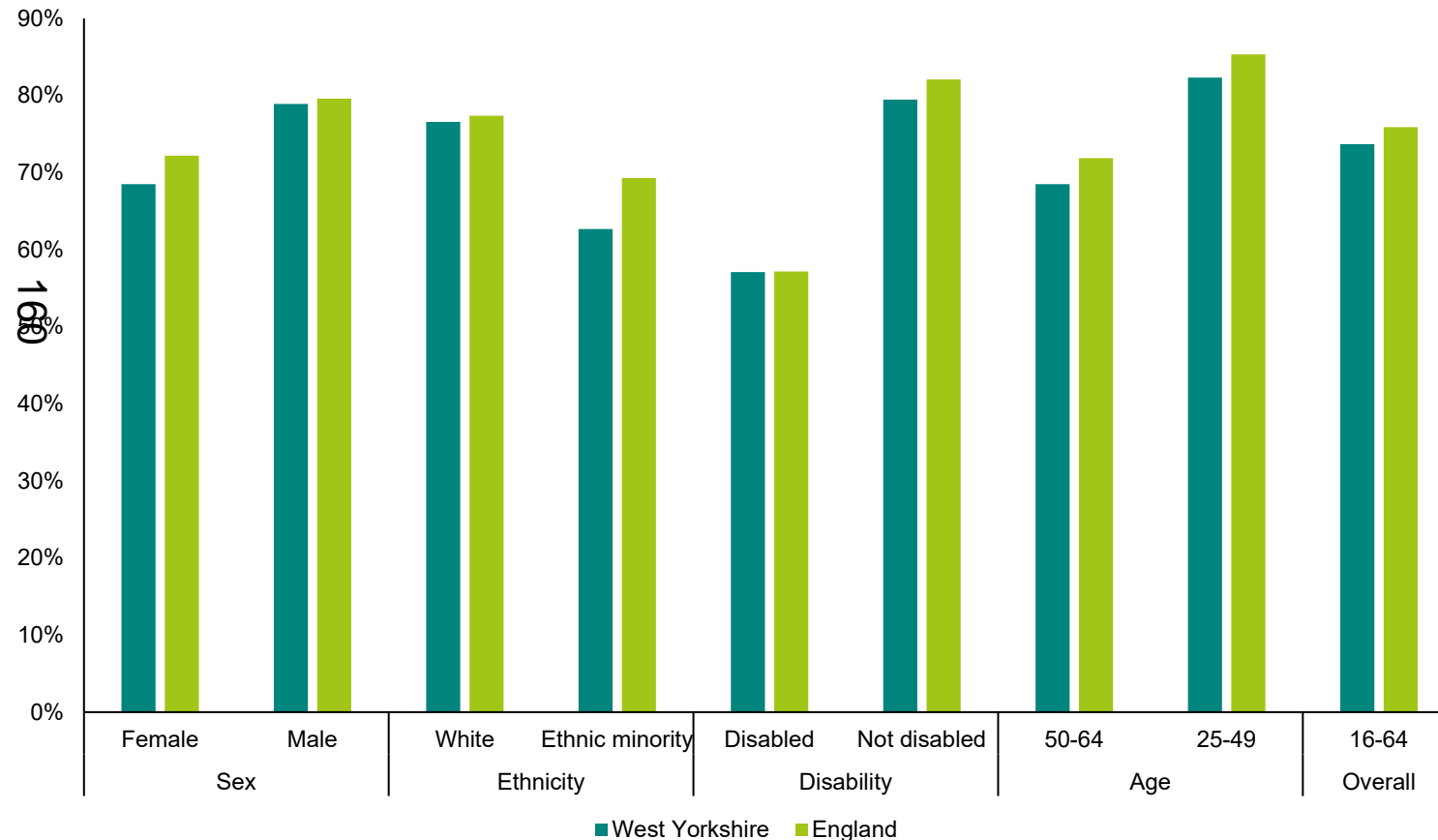


The study is exploring the overlaps between traditional sectors and emerging clusters with 15 traditional sectors linked together with 16 emerging tech clusters (pictured).

The sector/cluster map can be divided into three main (overlapping) groups, each of which represents an opportunity for the region.

# Closing the productivity gap should bring more direct and indirect jobs, those could help closing the employment gap between population groups

**Figure:** Employment rates by selected population groups  
(Oct 2022-Sep 2023)



- Employment rates in West Yorkshire are lower than the national average, especially for ethnic minorities and women.
- West Yorkshire underperforms in job quality indicators like good employee involvement and opportunities for career progression.
- Addressing these issues through Fair Work Charter will ensure that indirect jobs from a productivity boost contribute to inclusive growth and reduce poverty.

# Building a framework

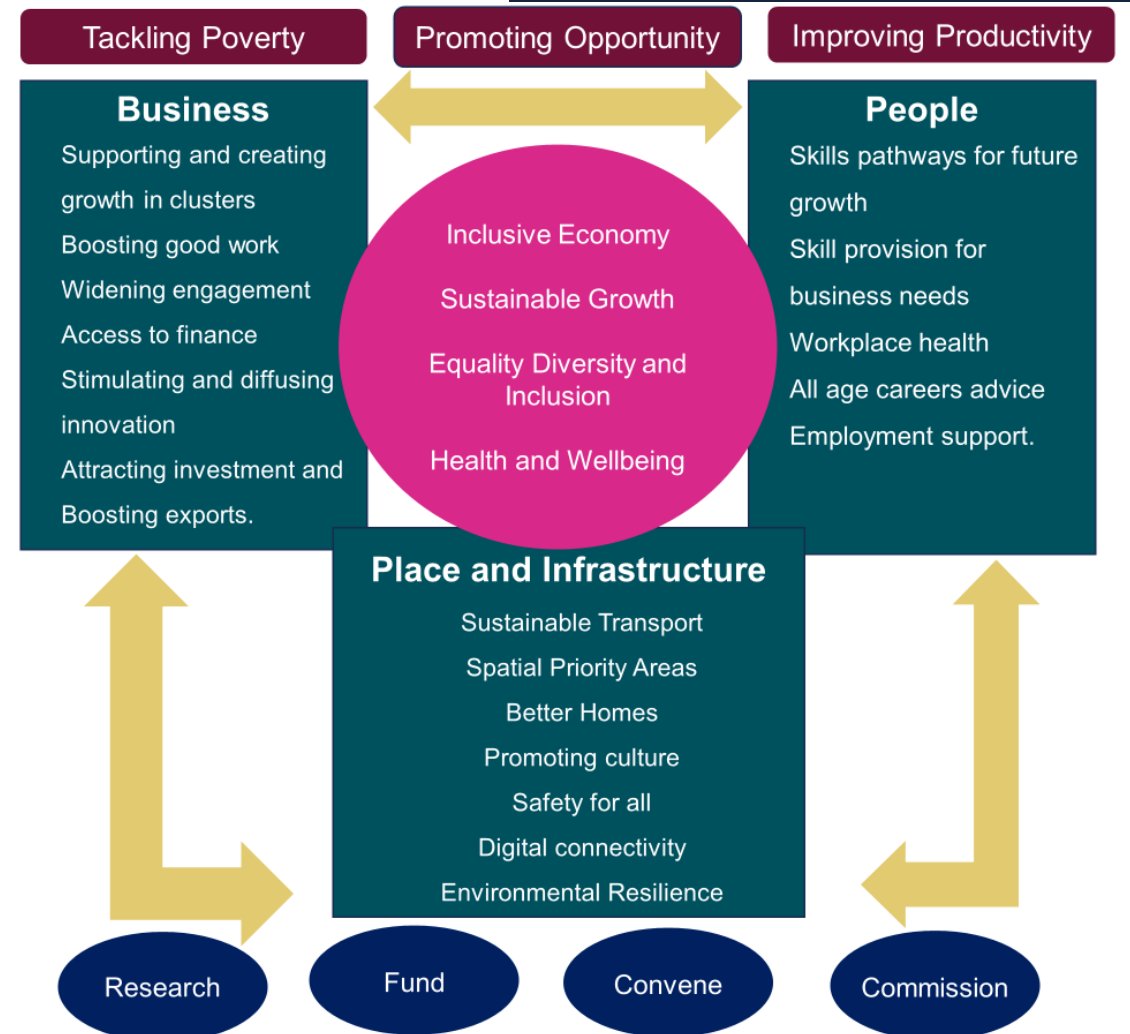
161

# A Framework for Action

The framework aligns with the vision and missions of the West Yorkshire Plan against the pillars of productivity where we need to act. This puts a sustainable inclusive economy at its heart with health as a key driver of activity.

Prioritisation must unpick the relationship between prosperity and inclusivity ensuring that all areas can benefit from the region's strengths.

Our approach must take a whole systems view of economic development recognising the complex inter-related challenges we face and identifying the right solution at the right spatial level.



# Core Principles

**Inclusive Economy:** this means connecting all parts of our region to opportunity and understanding the wider drivers of productivity including issues such as childcare where we can look at sector needs to offer choice for families and support to children from disadvantaged backgrounds.

**Sustainable Growth:** this means stimulating investment opportunities for net-zero, boosting green skills, and attracting green jobs to the region, while supporting decarbonisation of transport, homes, and industry to meet our net-zero target.

**Equality Diversity and Inclusion:** ensuring we champion the diversity of West Yorkshire and utilise networks within communities to reach all parts the region where support is needed.

**Health and wellbeing:** recognising the role of health and wellbeing in our region's prosperity and promoting good health in employment, transport, and infrastructure development.

# Draft Priorities

## Business

### Building on strengths where West Yorkshire has a comparative advantage in established and emerging clusters:

- Build on and work with business leaders to overcome barriers and unlock investment
- Working with cluster leadership bodies nationally and make links regionally including with universities
- Support opportunities to drive export growth
- Delivering skills pathways aligned to cluster opportunities
- Working with local authorities to ensure the quality and availability of business premises
- Build on the Investment Zones model to wider sectors / clusters of excellence across West Yorkshire linking to university expertise, national and regional bodies.
- Sector targeting for productivity growth must reflect our ambitions for an inclusive economy and consider synergies between sectors. We need to widen our understanding of productivity drivers to consider the impacts of issues such as childcare.

# Draft Priorities

**We want to ensure that the areas of West Yorkshire's economy can promote good work but particularly in those sectors where there are high numbers of employment such as retail and hospitality:**

- Capturing learning from the first year of delivery of the Fair Work Charter and building on the successes
- Working with sectors to support uptake and embed good practice bringing together communities of good practice
- Building on best practice of what works in boosting low productivity, especially in sectors of the West Yorkshire economy currently characterised by large scale, low pay employment.
- Supporting businesses to implement sustainability changes.

**We need to deepen our understanding of the finance landscape to include a focus on place-based impact investing and investment opportunities for under-represented groups.**

- Provision of grants will not be sufficient to address the investment gap in West Yorkshire. Our role to foster the right conditions for investment and leverage funding should be strengthened. Investment Zones provide a strategic opportunity to do this.

# Draft Areas for Action

**We must simplify the business ecosystem recognising the role of the Combined Authority as a convenor of support and raising awareness of all types of provision:**

- A clear, easy to access portal of information for businesses and professional services.
- We must consider informal networks and key individuals within these networks to broaden our reach and sign-posting activity.
- We must do more to celebrate and elevate the diversity of businesses in our region including in sectors not directly supported by Combined Authority programmes.
- Alternative business models should also be considered alongside an articulation of the role of the Combined Authority.
- The COVID-19 Pandemic has impacted upon the future of work, we must reflect these opportunities in our offer of business support reflecting the needs of different types of businesses and understanding more on the potential of the informal economy and informal support networks that exist.



# Draft Areas for Action

- Skills are a big driver of inequality between places and have central role to play in an inclusive economy. There is a need to move beyond just upskilling and understand where it might be more appropriate to focus support on lower-level skills with the opportunity to open-up in work support.
- Our review of the skills system and further devolution will support our ambition to fully integrate business and skills working with local employers to understand their current and future skills needs and make sure our schools, colleges, universities and training providers deliver the right courses to meet these.

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<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Working Towards a Child First Approach in the Combined Authority</b>
<b>Director:</b>	Liz Hunter, Director Policing, Environment and Place
<b>Author:</b>	Georgia Watkinson, Violence Reduction Partnership Research & Evaluation Specialist

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 The purpose of this report is to seek endorsement to taking a Child First approach in the Combined Authority and agree to the development of a framework and charter. These will be co-produced with children in West Yorkshire to ensure their voices are at the heart of the approach moving forward.

## 2. Information

### Background to the Approach

- 2.1 Child First is a summary of *what works* when working with children and can be used to support decision making by giving consideration for how children specifically will be impacted by the work we do. This can be adopted throughout our policy development, project implementation and service delivery, from frontline practitioners working directly with children, to designing services and interventions for children.
- 2.2 The West Yorkshire Plan highlights the vision of *a brighter West Yorkshire – a place that works for all*, so it is essential children are involved in achieving this. The Plan states that to deliver our missions and meet our 2040 vision, collaboration is key. This collaboration

should include children, whether this be through co-production, co-design or consultation to ensure that our vision for the future of West Yorkshire aligns with children's vision too. Adopting Child First aligns to the Mayor's priorities around community engagement by using the voice of children to shape the plans for the future of West Yorkshire.

2.3 There is already existing good practice within the Combined Authority, for instance:

- The Youth Hub User Research project, currently commissioned by WYCA, will help inform the design of future Youth Employment provision in the region, through capturing the voice/experience of young people currently accessing employment support provision.
- The Mayor's Green Jobs Taskforce Recommendations were developed and designed with a range of stakeholders, including children and young people. This engagement came through a 'Green Skills Summer School', commissioned by the Employment & Skills Team and delivered by Ahead Partnership in 2022.
- The Apprenticeship and Technical Education Pilot (commissioned by WYCA and delivered jointly by WYCA/Amazing Apprenticeships) finished its first year of delivery in 2023, has been iteratively designed by young people throughout, and co-design of the next element of the programme will be done in partnership with young people.
- The Schools Partnership Team's Enterprise Advisers programme sees local businesses go into secondary schools, sixth forms and further education colleges to support children and young adults with their skills and employability, enhancing their career outcomes. This is based on research evidence that found a *young person who has four or more encounters with an employer is 86% less likely to be unemployed or not in education or training and can earn up to 18% more in their career.*
- The Mayor's Big Climate Chat includes a specific consultation aimed at school students to capture their views on the climate crisis. This survey was co-designed with children and young people alongside the Youth Work Unit. A face-to-face Climate Conversation was also held with members of the Youth Work Unit and the Regional Youth Climate Assembly.
- At the Convention of the North, the Combined Authority invited 60 secondary school children from around the North to provide insights into the policy discussions. After providing invaluable input into the four thematic workshop sessions on the first day of the conference, which will shape the emerging Manifesto for the North, a summary of key issues and concern was presented at the plenary session on the second day. A key ask to the adults in the room was to listen more to the voices of children.

- The Violence Reduction Partnership's [Youth Commission](#) conducted peer research with children and young people across West Yorkshire between May and October 2023. They produced a set of recommendations and presented these to partners at an event in October and are currently co-producing a social media campaign based on their priorities.
- On Monday 19 February 2024 the Mayor held a West Yorkshire Youth Conference. The event was co-produced with, and hosted by the Mayor's Youth Advisory Group and was informed by data gathered from over 2000 young people. The conference provided a platform for young people to voice their views, experiences and concerns in relation to policing, crime and community safety issues. This event was led by young people and the actions from the conference will be driven by young people too.

2.4 It is proposed that the Combined Authority finds ways to enhance ongoing work by keeping the voice of the child central and being conscious of the language we use and the effect it can have.

2.5 There are already a number of business areas where this approach is evidenced and that the Combined Authority can learn from partners, particularly the five districts. For example, this approach aligns to the child friendly ambitions of both [Leeds](#) and [Bradford](#) and will be a continuation of the existing Child First practice embedded in each district's Youth Justice Service. It also supports the Violence Reduction Partnership and the Integrated Care Boards's [Adversity, Trauma & Resilience Programme's](#) ambition of being a trauma informed region by 2030, as adopting a Child First approach will help ensure a trauma informed approach for children in West Yorkshire. Further examples of best practice within districts and with partners are outlined below:

- Bradford – Bradford Youth Service involve children and young people in co-producing their programmes of work. They are also involving children in creative projects, such as the weapons sculpture to continue the legacy of the knife angel that was hosted in Bradford in April 2023.
- Calderdale – The Calderdale Safeguarding Children Partnership have a number of 'Young Advisors' who are responsible for gathering views and feedback from children in Calderdale. They have also created a [manifesto](#), including a number of priorities that will influence the work of the Safeguarding Children Partnership.
- Kirklees – the Ashbrow Community Fund involved both children and families on the panel that determined where funding would be spent within the local area to support the community.
- Leeds – The [Project Shield](#) campaign to tackle serious youth violence in Leeds has included consultation with children across the district, with the Youth Services

running a consultation to come up with the name and motto for the project. There is also a competition aimed at children in Leeds to design the logo which will be used across the community safety partnership.

- Wakefield – The [Big Conversation](#) used creative engagement to capture the views of children around what they want for the future of Wakefield. This covered community safety, access to green space and transport which was conveyed in a *play in a day*.
- A central guiding principle in the Youth Justice Board’s strategic plan is creating a justice system that treats ‘children as children’. Within this context, it is focused on promoting a childhood removed from the justice system, with a focus on building a child’s pro-social identity whilst removing systemic barriers that prevent a child from achieving their full potential. By collaborating with children, we can better improve relationships between children and criminal justice agencies and improve community cohesion and social inclusion. This can help prevent children from being drawn into the Criminal Justice System, instead seeing opportunities for them to make positive contributions to their community and move towards an offending free future.

2.6 Whilst Child First is not new and many organisations adopt good practices, the approach here is to complement existing work whilst increasing its reach and focussing on sharing good practice.

### **Future Considerations For A Child First Approach In The Combined Authority**

2.7 Work has already started with teams across the organisation and the following table contains examples of questions that teams are starting to consider:

Corporate Objective	Questions to be considered from a Child First lens
Empowering our communities, towns and cities to thrive	For homes to be sustainable they need to meet the needs of future generations, what do children want for their future home?
Building a sustainable, nature rich and carbon neutral region	What would enable children to access green space? Do children feel safe in green spaces?
Creating an accessible, clean and customer focussed transport system	How is it accessible to children, including children with SEN? Do children feel safe when using public transport?

Supporting community safety and accountable, proactive policing	What makes children feel safe in their community to allow them to thrive? Where do they not feel safe?
Championing culture, sport and creativity	What barriers do children face to getting into culture or sport? Do they have access to the right facilities?
Driving economic growth and innovation to enable good jobs	What jobs do children want to do in the future? Are they available in West Yorkshire? Do they know what steps to take to get there? How does childcare responsibilities impact individual's access to work?
Enabling a diverse skilled workforce and accessible learning for all	Do children have access to the right skills and education to achieve their desired jobs? Are people from their community visible in these roles? What barriers do they see to them achieving their ambitions?

- 2.8 The Combined Authority have already delivered presentations on the Child First approach and how it can be applicable in our core business and across some of our partnerships such as the Violence Reduction Partnership (VRP) launch event and a Leeds providers forum. Future sessions are scheduled with Bradford Community Safety Partnership, VRP Education Symposium, West Yorkshire Adversity Trauma & Resilience Knowledge Exchange, and further internal training sessions.
- 2.9 A workshop resource pack has been created and shared across the partnership to enable consultation with children to develop both the framework and charter. These workshops are due to continue until the end of April, after which, a thematic analysis will be conducted and pulled together into a framework.
- 2.10 To ensure that the development of this approach is developed in line with the wider partnership, the Combined Authority have established a multi-agency working group with representation from all five districts. This includes membership from youth justice, probation, children's social care, education, employment & skills, transport, policing & crime, youth work teams, local authority, custody and the VCSE. Membership of this group constantly evolves and is responsive to need.
- 2.11 The Combined Authority may have corporate parenting responsibilities as it is classed as an LA for the purposes of the legislation that defines the responsibilities. Given this, the Combined Authority will consider looked after children and care leavers where it is relevant in our decision making, to enable them to have the support and opportunities that should be available to all.

2.12 Below are some considerations for how we can embed a Child First approach within the Combined Authority. This list is not exhaustive and will be developed in line with feedback from both children and partners:

- All teams within the Combined Authority to be aware of the Child First approach, and how it impacts their areas of business. This will include making conscious language choices in line with the approach. Teams will be responsible for considering the impact of any personal data processing in their Child First approach, ensuring that data protection is considered in the design of their processes.
- Child First to be embedded into the internal EQIA process to support the Combined Authority's equity, diversity and inclusion priorities.
- Regular forums for children to come together with decision makers in the Combined Authority, including the Mayor, to discuss priorities, encourage co-production and involve children in decision making.

### **3. Tackling the Climate Emergency Implications**

3.1 While there are no direct benefits to reducing carbon emissions, we will need to engage and involve children in our work to tackle the climate emergency. This should improve the effectiveness of our campaigns and interventions.

### **4. Inclusive Growth Implications**

4.1 Adopting a Child First approach will see benefits to children's wellbeing as it will enable professionals to better recognise and address their unmet needs in a way that works for each individual child. This will have a knock-on effect to their ability to engage with education and training. The Child First approach is future-focused, and strengths based, meaning a key emphasis is put on raising children's aspirations and supporting them to achieve.

### **5. Equality and Diversity Implications**

5.1 Age is a protected characteristic therefore it is essential we consider the impact our decisions have on children. Incorporating a Child First approach in the Combined Authority will put an emphasis on this and provide teams with guidance on how to effectively involve children in decision making processes so they are at the heart of our work.

5.2 The Child First approach will also strengthen our existing approach to the public sector equality duty and the requirement for us to have due regard to the need to advance equality of opportunity i.e. to have due regard to the need to remove or minimise disadvantage of those with a protected characteristic, the need to take steps to meet the



different needs of people with a protected characteristic; and the need to encourage participation in public life by underrepresented groups.

## **6. Financial Implications**

- 6.1 There may be resource implications as the approach becomes more embedded as a result of additional consultation needs, but there is currently no direct cost beyond that committed by the VRP.
- 6.2 As outlined above, investing our time in children now and allowing them to be involved in our work will help ensure that our 2040 vision is sustainable. The children in West Yorkshire now will be adults by 2040, so it is vital that our ongoing work considers the future needs of our children to prevent the need for future spending.

## **7. Legal Implications**

- 7.1 Adopting a Child First approach will support the Combined Authority in complying with its duties under the Equality Act 2010
- 7.2 The Combined Authority should have appropriate consideration to its corporate parenting approach. This places a special responsibility on West Yorkshire Combined Authority towards looked after children and care leavers to enable them to have the support and opportunities that should be available to all.
- 7.3 While there is no intention to collect any identifiable personal data of children, a child's opinion or inferences made by a child may amount to personal data processing if it can identify an individual (directly or indirectly). The implications of this could be increased high-risk data processing of children's personal data. Business areas will need to consider how to comply with the data protection principles with respect to children's rights and freedoms throughout the design of their processes in the Child First approach, ensuring consultation and engagement with children complied with data protection principles under the DPA2018 and UK GDPR.
- 7.4 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

- 8.1 There are no staffing implications directly arising from this report.

## **9. External Consultees**

- 9.1 No external consultations have been undertaken.

## **10. Recommendations**

- 10.1 That the Combined Authority endorses a Child First approach by agreeing that the Combined Authority engage with children in the development of a framework and charter.

## **11. Background Documents**

There are no background documents referenced in this report.

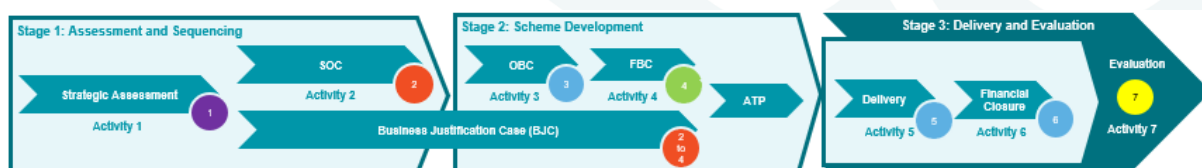
## **12. Appendices**

None.

<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Investment Zone Programme Approvals - Investment Priority 3 – Creating Great Places and Accelerated Infrastructure</b>
<b>Director:</b>	Liz Hunter, Director of Policing, Environment & Place
<b>Author:</b>	Craig Taylor, Head of Strategic Portfolio Office

## 1 Purpose of this report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 3 – Creating Great Places and Accelerated Infrastructure, within the West Yorkshire Investment Strategy (WYIS), that have been considered at stages 1, 2 and 3 of the Combined Authority’s assurance process.



- 1.2 The recommendations can be found in Section 12 of this report.

## 2 Report

- 2.1 This report presents proposals for the progression of schemes through the Combined Authority’s assurance process in line with the Combined Authority’s Assurance Framework. Further details on the schemes summarised below can be found as part of this report.

## 3 Investment Priority 3 (IP3) - Creating Great Places and Accelerated Infrastructure

- 3.1 At the Combined Authority in June 2021 the approach to the Single Investment Fund (SIF) and the West Yorkshire Investment Strategy (WYIS) were endorsed. The WYIS sets out the Investment Priorities for the period 1 April 2021 to 31 March 2024 which are framed across six areas.

- Investment Priority 1: Good Jobs and Resilient Businesses (including entrepreneurialism)
- Investment Priority 2: Skills and training for people Investment
- Investment Priority 3: Creating Great Places and Accelerated Infrastructure

- Investment Priority 4: Tackling the Climate Emergency and Environmental Sustainability Investment
  - Investment Priority 5: Future Transport Investment Priority
  - Investment Priority 6: Culture and Creative Industries
- 3.2 Investment Priority 3 is a broad investment priority with cross-cutting themes and is well aligned to place-making, housing, regeneration, flood risk and digital infrastructure which are key areas of activity driven by the Place Regeneration and Housing Committee, the West Yorkshire Combined Authority, and the Mayor.
- 3.3 Adopted in 2023, the West Yorkshire Plan 2040 sets 5 Missions which are relevant to IP3 and the programmes and projects in this approvals report, in particular Mission 1: A prosperous West Yorkshire – an inclusive economy with well paid jobs and Mission 2: A happy West Yorkshire – great places and healthy communities.

#### Background

- 3.4 The committee will be aware that West Yorkshire was conditionally awarded an Investment Zone by Government in the 2023 Spring Budget. The Investment Zone programme seeks to harness local sector strengths to drive productivity and leverage the bottom-up energy of local talent, knowledge and networks to deliver sustainable growth that benefits local communities. They will require a holistic approach and must be rooted in partnership between central government, local government, research institutions and the private sector.
- 3.5 A sectoral approach is being taken, with the Government requesting a focus upon a limited number of 5 priority sectors: Digital and Tech, Green Industries, Life Sciences, Advanced Manufacturing and Creative Industries. All Investment Zones should be based on growing an existing cluster and there is a focus on leveraging strength to increase opportunities for local communities.
- 3.6 The total funding available is £80,000,000 over a 5-year period (2024/25 – 2028/29) which can be directed towards revenue and capital spend. An announcement confirming government funding for West Yorkshire is expected in the government's Spring budget on 06 March 2024 and a verbal update will be given at the 14 March Combined Authority meeting. The government announcement may also confirm the extension to £160,000,000 over 10 years that was outlined in the Autumn Statement (2023). This Project Approval is for the initial £80,000,000 only.
- 3.7 The Combined Authority is leading on developing the West Yorkshire Investment Zone in partnership with the 5 local authorities, our universities and private sector businesses. This process includes agreeing the sectoral focus and geography for the Investment Zone as well as the most appropriate package of incentives to achieve maximum outcomes.

## The West Yorkshire Investment Zone

3.8 It was agreed with Partners that the sectoral focus of the Investment Zone would be Life Sciences (specifically health innovation/ health-tech) and Digital Tech – with the critical overlapping specialism of Digital Health. Although there are clear cluster strengths, the Investment Zone presents an opportunity to build infrastructure and create revenue interventions that stimulate growth, increasing productivity and innovation abilities regionally and nationally. A Programme of Capital and Revenue Interventions has been developed with local authority and university partners which deliver on four key objectives:

- Generating more innovation activity across our business base.
- Increasing direct investment in research and development space, equipment, and facilities.
- Increase investment and knowledge transfer across businesses within scope of our proposals.
- Increasing collaboration with the business and university ecosystem.

## Scheme Summaries

<p><b>West Yorkshire HealthTech and Digital Tech Investment Zone</b></p> <p>Leeds, Bradford, Kirklees</p>	<p><b><u>Scheme description</u></b></p> <p>The West Yorkshire HealthTech &amp; Digital Tech Investment Zone aims to foster innovation, collaboration, and the growth of companies operating in the healthcare and digital technology cluster.</p> <p>It will deliver targeted investment in local infrastructure and facilities, research and development, training, business support, sector engagement and business finance.</p> <p>The programme has a spatial focus and includes capital projects in Leeds, Huddersfield and Bradford, aligned with the universities and revenue programmes to deliver incubation space supporting business innovation.</p> <p>The programme is to be delivered through the Investment Zone fund following confirmation of Government funding.</p> <p><b><u>Impact</u></b></p> <p>The programme is targeted at delivering sustainable growth in the scale, productivity, and international competitiveness of businesses in the regions HealthTech and Digital Tech clusters.</p> <p>It will promote inclusive growth through investment in education and skills, supporting new and better paid employment opportunities and engaging more women and people from ethnic minorities in the HealthTech and Digital Tech sector.</p> <p>The scope of the programme is broadly aligned with the West Yorkshire Climate Emergency Plan and work is underway to establish a framework for assessing the value for money of interventions at a programme and project level.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 (strategic outline case) and work commences on development of the business cases for schemes within the programme</p> <p>Total value of the scheme - £179,368,000 (including indicative match funding)</p> <p>Total value of Combined Authority funding - £80,000,000 (subject to confirmation of Government funding).</p> <p>Funding recommendation sought - £6,400,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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### **Delegated Approvals Update**

- 3.9 Since the Combined Authority’s meeting on 1 February 2024, the following decision points and change requests have been assessed in line with the Combined Authority’s assurance process and approved through the agreed delegation to the Place, Regeneration and Housing Committee at its meeting on 29 February 2024. The decisions were made by the Place, Regeneration and Housing Committee following a recommendation from Combined Authority Director of Policing, Environment & Place.

3.10 The full agenda and papers for the meeting can be found on the Combined Authority website [here](#).

<b>BHF Leeds City Village Phase 1 - Leeds</b>	<p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £7,667,000</p> <p>Total indicative value of the scheme: £200,330,000</p> <p>Total indicative value of Combined Authority funding: £7,667,000</p>
<b>BHF Parkwood Mills</b>	<p>Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).</p> <p>Funding approved: £600,000</p> <p>Total indicative value of the scheme: £8,042,483</p> <p>Total indicative value of Combined Authority funding: £600,000</p>
<b>BHF Kirkby Road (Oaklands)</b>	<p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £1,257,484</p> <p>Total indicative value of the scheme: £39,271,576</p> <p>Total indicative value of Combined Authority funding: £1,257,484</p>
<b>BHF Bradford Road Idle</b>	<p>Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).</p> <p>Funding approved: £341,500</p> <p>Total indicative value of the scheme: £10,783,362</p> <p>Total indicative value of Combined Authority funding: £341,500</p>
<b>BHF Elland Town Hall</b>	<p>Approval to proceed through decision point 4 (Full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £840,000</p> <p>Total indicative value of the scheme: £7,243,000</p> <p>Total indicative value of Combined Authority funding: £840,000</p>
<b>BHF St Cecilia Street</b>	<p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £1,250,000</p> <p>Total indicative value of the scheme: £17,889,004</p> <p>Total indicative value of Combined Authority funding: £1,250,000</p>
<b>BHF Plane Street</b>	<p>Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).</p> <p>Funding approved: £450,000</p> <p>Total indicative value of the scheme: £8,917,379</p> <p>Total indicative value of Combined Authority funding: £450,000</p>

<b>BHF Middlecross Extra Care</b>	Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery). Funding approved: £1,300,000 Total indicative value of the scheme: £19,472,238 Total indicative value of Combined Authority funding: £1,300,000
<b>BHF Hough Top Court</b>	Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery). Funding approved: £1,640,000 Total indicative value of the scheme: £22,404,738 Total indicative value of Combined Authority funding: £1,640,000

## 4 Information

4.1 The Combined Authority's assurance framework requires that formal approval is given to the following elements of a scheme as part of its development:

- The progression of a scheme through a decision point to the next activity.
- Indicative or full approval to the total value of the scheme funding requested.
- The Combined Authority's entry into a funding agreement with the scheme's promoter.
- The assurance pathway and approval route for future decision points.
- The scheme's approval tolerances.

4.2 This report provides information required to enable the Combined Authority to approve each of the above elements.

### Additional Approvals

#### **Enterprise West Yorkshire Change to Project Timescales**

4.3 Although the Enterprise West Yorkshire scheme sits in Investment Priority 1, Good Jobs and Resilient Businesses, the scheme complements the enterprise elements of the Investment Zone programme, and in the interests of expediency of delivery, has been incorporated into this report for its timescale change request approval.

4.4 The Enterprise West Yorkshire scheme (previously referred to as Entrepreneurship Package of Support) was approved in June 2021. £6,000,000 of Combined Authority funding was approved to deliver support for economic recovery following the Covid-19 pandemic. The programme was to be delivered over three years and was designed to encourage entrepreneurship and to help people get the support that they needed to build successful businesses.



- 4.5 The scheme focusses on enterprise support across three workstreams, offering free support that will help people in the region to explore and establish new businesses:
- Workstream one comprises of a marketing campaign to raise awareness of Entrepreneurship as a career choice, an 'Exploring Enterprise' programme to engage participants, and a schools programme to develop entrepreneurship as a career option for young people
  - Workstream two comprises of two elements of support, collectively known as 'Start Up West Yorkshire' which provides advice on setting up businesses and support for businesses and this is delivered by 'People Plus' and five Start Up Managers who are based within each local authority.
  - Workstream three supports early-stage, innovation driven individuals or business with the bespoke and targeted support they need. The University of Leeds (Nexus) is leading a consortium of partners to deliver workstream three in full.
- 4.6 Workstreams one and two have been in active delivery since January 2022, with up to 2061 people enrolled onto the programme and 287 new businesses accessing coaching and mentoring. Workstream three has encountered significant procurement delays and therefore, an extension of delivery timeframes is requested which will allow the outputs and outcomes to be achieved as planned.
- 4.7 Due to underspend on the project so far, funding is available to extend the timescales for the delivery of the Enterprise West Yorkshire scheme by 12 months meaning the full project would be delivered by 30 September 2025. There will be no increase in Combined Authority funding as a result of the timescales extension.
- 4.8 As a result of the timescale extension, there will be an increase in outputs for workstream two. 140 additional start-up businesses will be supported through 'People Plus' and 36 new businesses will access coaching and mentoring support via Start Up Managers.
- 4.9 The Combined Authority approves that:
- (i) The change request for the Enterprise West Yorkshire scheme to extend delivery timeframes by 12 months, from 30 September 2024 to 30 September 2025, is approved.
  - (ii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in Portfolio Investment Panel report.

### **Projects in Stage 1: Assessment and Sequencing**

- 4.10 There are no schemes to review at this stage.

## Projects in Stage 2: Scheme development

<b>Programme Title</b>	<b>The West Yorkshire HealthTech and Digital Tech Investment Zone programme</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 (strategic outline case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

### Background

- 4.11 In March 2023 the Government announced the introduction of Investment Zones – a policy instrument designed to help areas level-up, increase the rates of innovation and secure additional private sector investment, with up to £80,000,000 available to deliver this over a five-year period (2024/25 – 2028/29) which can be directed towards revenue and capital spend. An announcement confirming Government funding for West Yorkshire is expected in the Government’s Spring budget on 6 March 2024 and a verbal update will be given at the 14 March Combined Authority meeting.
- 4.12 Since these announcements, the proposals for a West Yorkshire Investment Zone ‘programme’ have been developed further through a series of approval gateways with the Department of Levelling Up, Homes & Communities (DLUHC) to refine the sector and geography, the scope of interventions and approach to governance and implementation.
- 4.13 It was agreed with Partners that the sectoral focus of the Investment Zone would be Life Sciences (specifically health innovation/ health-tech) and Digital Tech – with the critical overlapping specialism of Digital Health. Although there are clear cluster strengths, the Investment Zone presents an opportunity to build infrastructure and create revenue interventions that stimulate growth, increasing productivity and innovation abilities regionally and nationally. The following statistics highlight the clear gap and opportunity to level-up:
- Only 42.5% of businesses in West Yorkshire define themselves as innovation active (behind South Yorkshire, Greater Manchester and the West Midlands).
  - The region also has the lowest investment in R&D per £1,000,000 of GVA of any English region outside London.

- Only 23% of businesses participate in knowledge transfer and only 21% invest in R&D.
  - Businesses are most likely to collaborate with other businesses (42%) with only 18% engaging with a university.
- 4.14 A Programme of Capital and Revenue Interventions has been developed with local authority and university partners which deliver on four key objectives:
- Generating more innovation activity across our business base.
  - Increasing direct investment in research and development space, equipment, and facilities.
  - Increase investment and knowledge transfer across businesses within scope of our proposals.
  - Increasing collaboration with the business and university ecosystem.
- 4.15 The West Yorkshire' Healthtech & Digital-tech Investment Zone aims to foster innovation, collaboration, and the growth of companies operating in the healthcare and digital technology cluster. This will involve engaging with local councils, universities, and businesses to create new opportunities through capital and revenue interventions in research and innovation, skills, stakeholder support, inward investment and infrastructure.
- 4.16 Programme outcomes are focused on increasing skills to support business and innovation, creating incubator space and increased opportunities and support for collaboration with research and health institutions, unlocking land for development and providing improved access. The programme consists of a set of capital (local infrastructure, land, buildings and facilities) and revenue (research, training, business support, sector engagement and seed-funding) projects.
- 4.17 At this stage, it was agreed not to progress with the option of designating tax or Business Rates Retention (BRR) sites. This decision was led by local authority partners as the relevant bodies and centred on the restrictive nature of the offer with a clear preference for other revenue interventions being prioritised.
- 4.18 The programme has a spatial focus, confirmed with Government, and includes capital projects in Leeds, Huddersfield and Bradford, aligned with our universities and targeted revenue programmes to deliver incubation space supporting business innovation. The wider range of revenue interventions are region wide however, supporting innovation across West Yorkshire.
- 4.19 The programme is aligned to strategic and local policy including:
- [The West Yorkshire Plan - West Yorkshire Combined Authority \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk) Mission 1 'A prosperous West Yorkshire – an inclusive economy with well paid jobs'
  - [West Yorkshire Employment and Skills Framework 2021 \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk)

- [West Yorkshire HealthTech Strategy 2022-2027](#)
- [Leeds City Region Innovation Framework](#)
- [Huddersfield Station to Stadium Masterplan Framework \(2023\)](#)
- [Emerging Development Framework for the City of Bradford](#)
- [Leeds City Centre West - Innovation Arc North SPD \(Oct 2023\).](#)

4.20 As confirmation of government funding for West Yorkshire is not expected until the government's Spring budget on 06 March 2024 it is proposed that a programme update is brought to the 20 June 2024 Combined Authority meeting on to provide further detail and seek further approvals, including:

- Confirmation of the programme funding profile and the status of any match funding.
- Confirmation of the programme output profile.
- Confirmation of the projects that will be included in the programme at inception and arrangements for maintaining a pipeline of reserve projects.
- Proposals for Committee and/or Officer delegations together with approval pathways and tolerances for individual projects (or sub programmes as appropriate).
- Details of the framework for assessing the value for money of interventions at a programme and project level, including the monitoring and evaluation of outputs and outcomes.

4.21 So that work can continue, this report requests development funding of £6,400,0000 to support the design, development and delivery of the programme.

4.22 The Combined Authority as the Accountable Body will be responsible for the delivery of the programme. The Senior Responsible Officer (SRO) is the Director of Policing, Environment and Place, and a Programme Board is in place. A Steering Group is being established to enable partners (local authorities, universities and sector organisations/networks) to advise and support delivery.

4.23 A summary of the programme business case is included in **Appendix 1**.

### **Outputs and Outcomes**

4.24 The specific outputs are subject to confirmation with Government. For capital projects this is expected to include the amount of floorspace/land developed/improved for sector specific activities (i.e. business incubators<sup>1</sup>).

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<sup>1</sup> 'Incubators' provide start-ups and early-stage businesses with support and resources, including access to networks, investors and mentors, or specialist/flexible working space.

For revenue projects this is expected to include the take-up of education, training and businesses support (i.e. seed-funding<sup>2</sup>, business accelerators<sup>3</sup>).

- 4.25 The programme outcomes are outlined in section 3 of this report.
- 4.26 Work is underway to establish a framework for assessing the value for money of interventions at a programme and project level, including the monitoring and evaluation of outputs and outcomes.

### **Tackling the Climate Emergency Implications**

- 4.27 A Stage 1 Carbon Impact Assessment (CIA) for the programme has been completed. This indicates that the scope of the programme is broadly aligned with the West Yorkshire Climate Emergency Plan (CEP).
- 4.28 The climate emergency implications of the programme are:
- An increase in capital carbon emissions through investment in research and development space, equipment and facilities and local sites and infrastructure.
  - A potential reduction in operational carbon emission through greater uptake of technology driven healthcare, reducing consumption, waste and the need for travel.
  - A commitment to creating sustainable buildings, reutilising and refurbishing historic buildings and unlocking brownfield land, minimising embodied carbon impacts and operational carbon emissions.
- 4.29 Stage 2 CIA assessments will be undertaken for all projects as they come forward through the assurance process to demonstrate how carbon emissions will be managed and mitigated over the full project lifecycle. The carbon impacts of the programme as a whole will be considered as part of the programme evaluation.

### **Inclusive Growth Implications**

- 4.30 The programme aims to promote inclusive growth through investment in education and skills, new and better paid employment opportunities, and improved healthcare outcomes. The geographical focus of key interventions are within or in close proximity to areas with high levels of deprivation in Leeds, Bradford and Huddersfield.
- 4.31 The inclusive growth implications of the programme include:

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<sup>2</sup> 'Accelerators' provide intensive, time-limited business support for cohorts of startups, to get them ready for investment.

<sup>3</sup> 'Seed-funding' refers to early-stage funding for the costs associated with developing a proposition

- A focus on improving access to education, skills and career progression routes for people from typically underrepresented groups and communities.
- Supporting new and better paid jobs by enabling businesses to locate and grow in the area.

### **Equality and Diversity Implications**

- 4.32 A Stage 1 Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the programme and the business case development.
- 4.33 The equality and diversity implications of the programme are:
- Providing education and training to address barriers to employment for young people (18-24), those aged over 50, and disabled people.
  - Engaging more women and people from ethnic minorities in the HealthTech and Digital Tech sector.
- 4.34 Stage 2 EqIAs will be completed for all projects as they come forward through the assurance process, to establish how positive outcomes can be achieved across the protected characteristics.

### **Consultation and Engagement**

- 4.35 The programme was developed through consultation and engagement with local authority partners, universities, healthcare providers, HealthTech and Digital Tech sector networks, the DLUHC and other Government departments.
- 4.36 A stakeholder engagement plan for the programme is in place and the communications strategy will focus on maximising awareness and take-up of opportunities by individuals, business and organisations, and reflect the Combined Authority's priorities for inclusive growth, equality, diversity and inclusivity.
- 4.37 The extent of public consultation on individual projects will be determined through business case development, and where required for meet statutory obligations such as the planning process.

### **Risks**

- 4.38 The key programme risks and mitigations are:
- The risk that cost increases and delays/reductions in funding limit the scope of the programme – mitigated by ongoing cost profiling to maintain appropriate contingencies and allowances, and ongoing engagement with DLUHC and local authority partners on the release of programme and project funding.
  - The risk of programme delays due to capacity constraints and limited project development activity - mitigated by the release of development

funding to support the design and development of the overall programme and support partners project development.

- The risk of reduced programme outputs due to lack of demand and limited take up of services and opportunities – mitigated by robust project design, effective communications, and ongoing stakeholder engagement activities.

4.39 The risk profile will evolve as the programme moves into delivery and individual risk registers will be maintained for all projects as they progress through the assurance process to ensure that service delivery and operational risks can be managed and mitigated.

4.40 All projects will complete a Data Protection Impact Assessment (DPIA) to identify risks arising out of the processing of personal data and to minimise these risks as far as possible.

### **Costs**

4.41 The total scheme costs are £179,368,000 (including indicative match funding).

4.42 The Combined Authority's contribution is £80,000,000. An announcement from the Government confirming this funding is expected in the Government's Spring Budget (6 March 2024). This funding is provisionally split between capital (£52,298,000) and revenue (£27,702,000).

4.43 The timing of the release of this funding has not been confirmed by DLUHC, the Government's sponsor Department. It is anticipated that initial funding will be released during quarter two of financial year 2024/25 and on this basis, it is proposed that the Combined Authority's Gainshare funding is used to cashflow the programme ahead of the release of Government funding.

4.44 The following match funding is also anticipated. However, this match funding is indicative only at this stage and will be confirmed following the Government's Spring Budget through further detailed business case and project development over the 5 year programme:

- £5,700,000 from the UK Shared Prosperity Fund
- £38,200,000 from the Department for Health & Social Care
- £10,400,000 from public sector land value uplift and capitalised rental income
- £45,068,000 from the private sector

4.45 Development funding of £6,400,0000 is requested to support the design, development and delivery of the programme over its initial 5-year timeframe to fund:

- Staffing resources in the Combined Authority and local authority partners.
- External technical advice and support, including legal, commercial and economic consultancy services.

- Early interventions to support project development, including site investigations and land and property acquisitions.

4.46 Delegation is requested to the Director of Policing, Environment and Place to allocate these development funds and to enter into funding agreements with local authority partners to progress the development of projects in their areas.

### **Future Programme Assurance Pathway and Approval Route**

4.47 The programme assurance pathway and approval route is shown below. The Combined Authority will be asked to endorse arrangements for the assurance and approval of individual business cases at its meeting on 20 June 2024

Assurance pathway	Approval route	Forecast approval date
Programme update	Recommendation: Combined Authority's Director of Policing, Environment & Place Decision: Combined Authority	20/06/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Policing, Environment & Place (DoPEP)	02/04/2029

### **Assurance Tolerances – Investment Zone Programme**

4.48 This approval is the first decision point for the programme at committee. The assurance tolerances for the recommended approval in this report are:

<b>Assurance tolerances</b>
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

4.49 Project level tolerances will be established as individual projects come forward through the assurance process.

### **Appraisal Summary**

4.50 There is a clear strategic rationale for intervention, closely aligned with national, regional and local priorities for innovation and growth. The programme has been developed through co-production (Government, local authority partners, universities and other key stakeholders) and work is underway to establish a framework for assessing the value for money of individual projects that will come forward from a pipeline of capital and revenue proposals over the 5-year Investment Zone programme.

### **Recommendations**

4.51 The Combined Authority approves that:



- (i) The West Yorkshire HealthTech and Digital Tech Investment Zone programme proceeds through decision point 2 (strategic outline case) and work commences on development of individual business cases.
- (ii) Indicative approval is given to the Combined Authority's contribution of £80,000,000. The total programme value is approximately £179,368,000 (including indicative match funding).
- (iii) Development costs of £6,400,000 are approved in order to progress programme and project development, taking the total approval to £6,400,000.
- (iv) Approval is given to the use of Gainshare funding to cashflow programme costs pending the confirmation of Government funding.
- (v) A programme update, including proposals for the assurance pathway and approval route of early projects, is brought forward for consideration by the Combined Authority at its meeting on 20 June 2024 with further programme level updates provided to the Combined Authority or thematic committees at regular intervals over the programme lifetime.
- (vi) The Director of Policing, Environment and Place is delegated to allocate development funds and to enter into funding agreements with partners to progress the development of projects in their areas.
- (vii) Future programme approvals are made in accordance with the assurance pathway, approval route and tolerances outlined in this report. Where further approval is required, the respective programme or schemes will return to the Combined Authority/Place, Regeneration and Housing Committee/Business or the Business, Economy and Innovation Committee.

### **Projects in Stage 3: Delivery and Evaluation**

4.52 There are no schemes to review at this stage.

## **5 Tackling the Climate Emergency implications**

5.1 The Climate Emergency implications have been considered on all projects included in this report as part of their business case development.

## **6 Inclusive Growth implications**

6.1 The inclusive growth implications have been considered on all projects included in this report as part of their business case development.

## **7 Equality and Diversity implications**

7.1 Equality Impact Assessments (EqIA) have been undertaken on all projects included in this report as part of their business case development.

## **8 Financial implications**

- 8.1 The report seeks endorsement to expenditure from the available Combined Authority funding as set out in this report.

## **9 Legal implications**

- 9.1 The payment of funding to any recipient will be subject to a funding agreement being in place between the Combined Authority and the organisation in question.
- 9.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **10 Staffing implications**

- 10.1 A combination of Combined Authority and local partner council project, programme and portfolio management resources are or are in the process of being identified and costed for within the schemes in this report.

## **11 External consultees**

- 11.1 Where applicable scheme promoters have been consulted on the content of this report.

## **12 Recommendations (Summary)**

### **Enterprise West Yorkshire**

- 12.1 The Combined Authority approves that:
- (i) The change request for the Enterprise West Yorkshire scheme to extend delivery timeframes by 12 months, from 30th September 2024 to 30th September 2025, is approved.
  - (ii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in the Portfolio Investment Panel report.

### **West Yorkshire HealthTech and Digital Tech Investment Zone programme**

- 12.2 The Combined Authority approves that:
- (i) The West Yorkshire HealthTech and Digital Tech Investment Zone programme proceeds through decision point 2 (strategic outline case) and work commences on development of individual business cases.
  - (ii) Indicative approval is given to the Combined Authority's contribution of £80,000,000. The total programme value is approximately £179,368,000 (including indicative match funding).

- (iii) Development costs of £6,400,000 are approved in order to progress programme and project development, taking the total approval to £6,400,000.
- (iv) Approval is given to the use of Gainshare funding to cashflow programme costs pending the confirmation of Government funding.
- (v) A programme update, including proposals for the assurance pathway and approval route of early projects, is brought forward for consideration by the Combined Authority at its meeting on 20 June 2024 with further programme level updates provided to the Combined Authority or thematic committees at regular intervals over the programme lifetime.
- (vi) The Director of Policing, Environment and Place is delegated to allocate development funds and to enter into funding agreements with partners to progress the development of projects in their areas.
- (vii) Future programme approvals are made in accordance with the assurance pathway, approval route and tolerances outlined in this report. Where further approval is required, the respective programme or schemes will return to the Combined Authority/Place, Regeneration and Housing Committee/Business or the Business, Economy and Innovation Committee.

### **13 Background Documents**

13.1 None as part of this report.

### **14 Appendices**

[Appendix 1 - West Yorkshire HealthTech and Digital Tech Investment Zone programme - Business Case Summary](#)

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## Project Overview

Project Title	<b>West Yorkshire HealthTech and Digital Tech Investment Zone Programme</b>
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Main Funding Programme	Investment Zone programme
Current Forecast Project cost	£179,368,000 (including indicative match funding)
Funding Applied for from the Combined Authority	£80,000,000
Other public sector funding amounts and sources	£54,300,000
Private sector funding amounts and sources	£45,068,000

## Scheme Description

The West Yorkshire HealthTech & Digital Tech Investment Zone aims to foster innovation, collaboration, and the growth of companies operating in the healthcare and digital technology cluster.

It will deliver targeted investment in local infrastructure and facilities, research and development, training, business support, sector engagement and business finance.

The programme has a spatial focus and includes capital projects in Leeds, Huddersfield and Bradford, aligned with the universities and revenue programmes to deliver incubation space supporting business innovation.

## Business Case Summary

### Strategic Case

As part of the Levelling Up agenda, the Government set out an ambitious plan for growth and prosperity, rooted in boosting the UK's potential to be an innovative nation, growing strengths in key industries to support local, regional and national priorities.

To achieve this, in the 2023 Spring Budget, the Chancellor announced eight Investment Zones, including West Yorkshire, each with £80m of funding to deliver interventions between 2024/25 – 2028/29.

The West Yorkshire Healthtech & Digital-tech Investment Zone aims to foster innovation, collaboration and the growth of companies operating in the healthcare and digital technology cluster. It will deliver targeted investment in local infrastructure and facilities, research and development, training, business support, sector engagement and business finance.

The Investment Zone programme was developed through consultation and engagement with local authority partners, universities, healthcare providers, HealthTech and digital tech sector networks, the DLUHC (Department of Levelling Up, Homes & Communities) and other Government departments. The programme has a spatial focus, confirmed with Government, and includes capital projects in Leeds, Huddersfield and Bradford, aligned with our universities and targeted revenue programmes to deliver incubation space supporting business innovation. The wider range of revenue interventions are region wide however, supporting innovation across West Yorkshire.

The Investment Zone programme supports the delivery of Mission 1 'A prosperous West Yorkshire – an inclusive economy with well-paid jobs' of the West Yorkshire Plan. It will also align with several of the Mayor's priorities and pledges (prioritising skills and training to ensure everyone has the skills they need to secure work, supporting local businesses and championing our regional economy) as well as the West Yorkshire Employment and Skills Framework (2021) and the West Yorkshire HealthTech Strategy (2022).

#### Economic Case

Work is underway to establish a framework for assessing the value for money of interventions at a programme and project level, including the monitoring and evaluation of outputs and outcomes.

#### Commercial Case

The approach to procurement is being established. For capital projects this is expected to include commercial tenders and open market competitions for design, management, and construction. Revenue projects may be delivered directly by the Combined Authority, commissioned by the Combined Authority or through direct award to universities, local authorities, and other third-party service providers.

#### Financial Case

The total programme costs are estimated at £179,368,000 and the Combined Authority's contribution of £80,000,000 is subject to an announcement from the Government in the Spring Budget (9th March 2024). The remaining costs will be



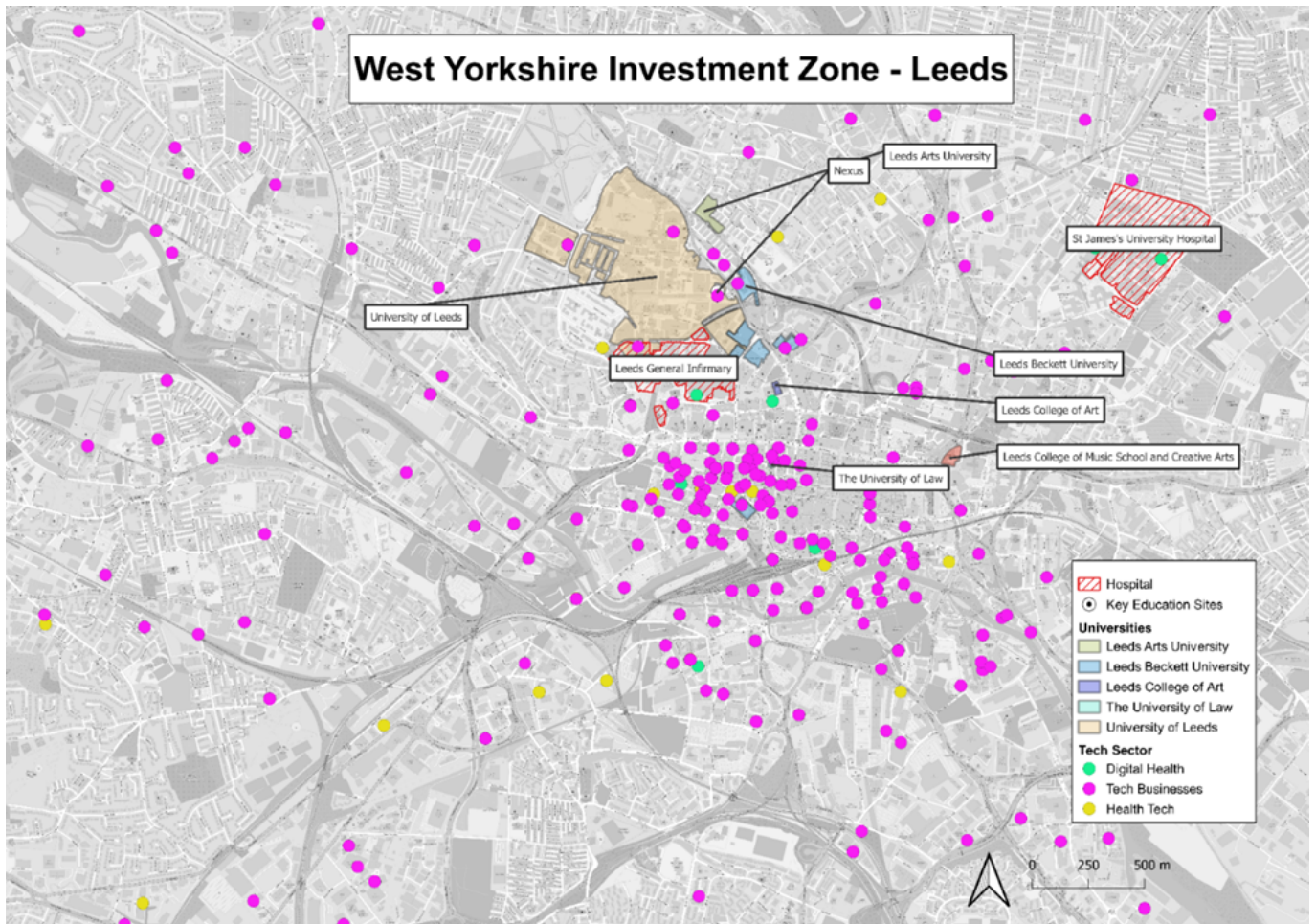
met by match funding from number of potential sources including the UK Shared Prosperity Fund, Department for Health & Social Care, Local Authority partners, Universities, and the private sector

#### Management Case

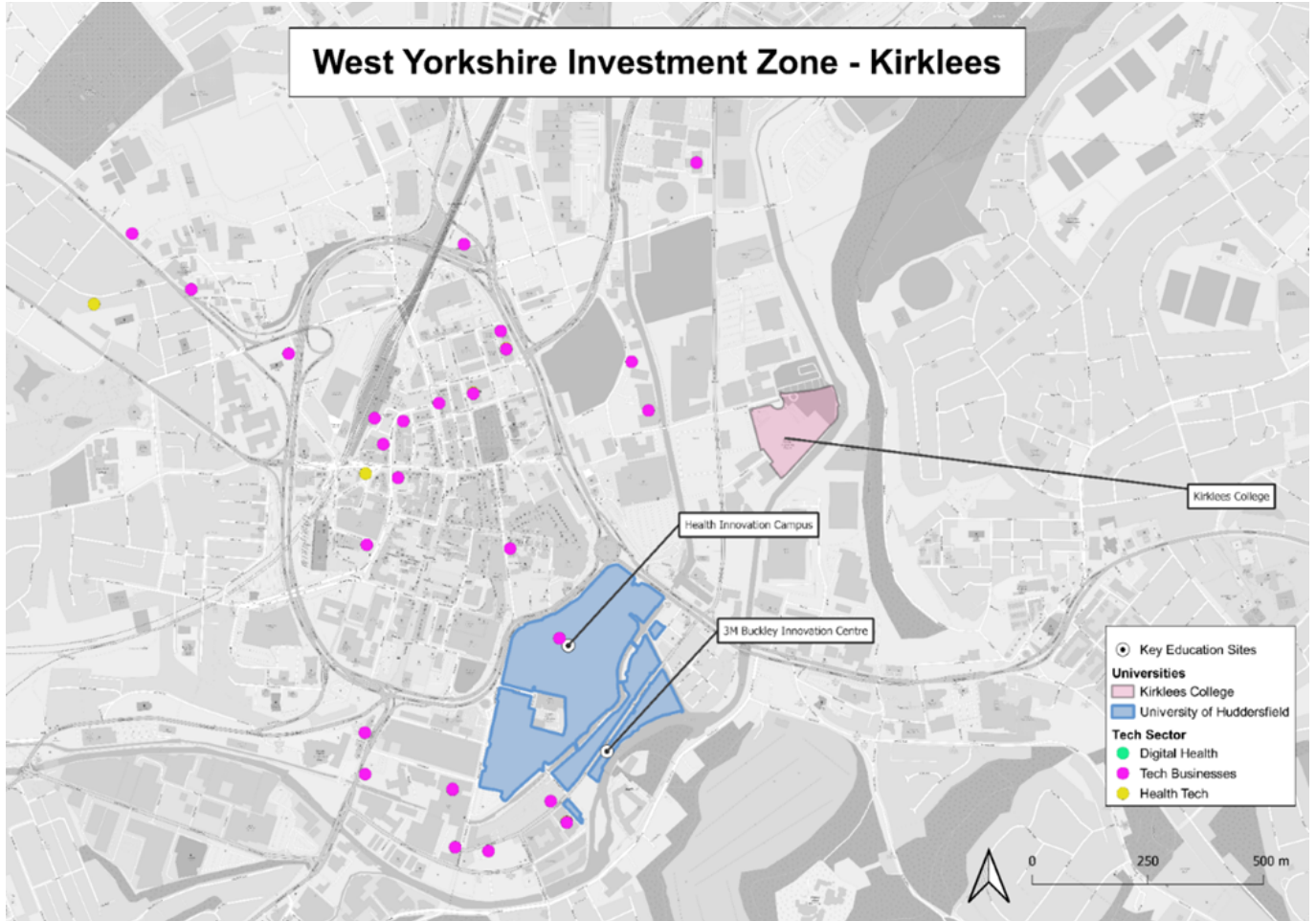
The Combined Authority as the accountable body will be responsible for the delivery of the programme. The Senior Responsible Officer (SRO) is the Director of Policing Environment and Place, and a programme board is in place. A steering group is being established to enable partners (local authorities, universities, and sector organisations/networks) to advise and support delivery. Delivery will commence in April 2024 with practical completion in March 2029.

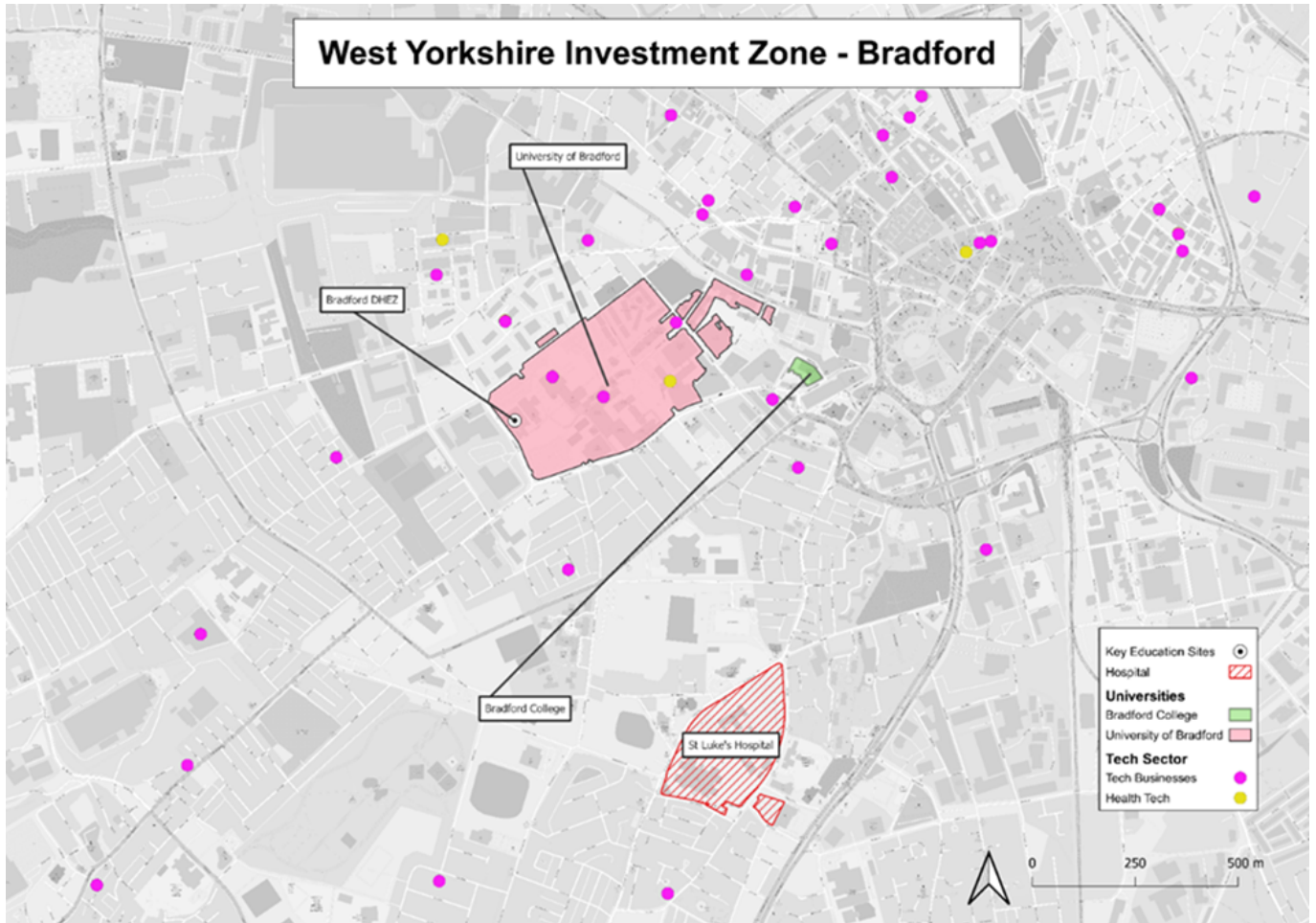
## Location Map

The following map shows the locations of the West Yorkshire Investment Zones.







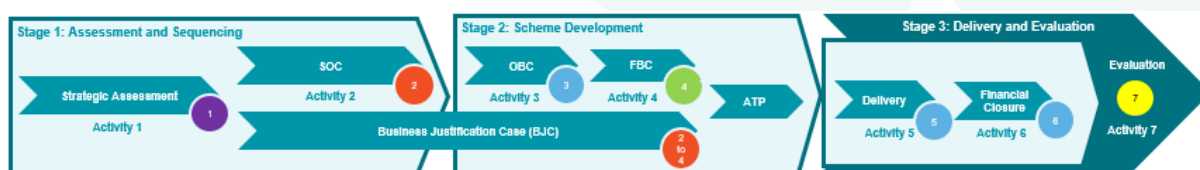


Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Local Nature Recovery Strategy Project Approvals - Investment Priority 3 – Creating Great Places and Accelerated Infrastructure</b>
<b>Director:</b>	Liz Hunter, Director of Policing, Environment & Place
<b>Author:</b>	Craig Taylor, Head of Strategic Portfolio Office

## 1 Purpose of this Report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 3 – Creating Great Places and Accelerated Infrastructure, within the West Yorkshire Investment Strategy (WYIS), that have been considered at stages 1, 2 and 3 of the Combined Authority’s assurance process.



- 1.2 The recommendations can be found in Section 12 of this report.

## 2 Report

- 2.1 This report presents proposals for the progression of schemes through the Combined Authority’s assurance process in line with the Combined Authority’s Assurance Framework. Further details on the schemes summarised below can be found as part of this report.

## 3 Investment Priority 3 (IP3) - Creating Great Places and Accelerated Infrastructure

### Background

- 3.1 The 2021 Environment Bill enacted a commitment to a [Nature Recovery Network](#) made in the government’s 2018 [25-year Environment Plan](#) to restore and enhance nature across England.
- 3.2 Key to the Nature Recovery Network is a system of 48 mandatory Local Nature Recovery Strategies (LNRSS) – spatial planning tools for nature. These are statutory levers that, together, will help to agree priorities, identify high-impact opportunities and propose measures to restore habitats and underpin wider nature recovery on the ground to deliver biodiversity and wider benefits.

## Policy Context

- 3.3 The LNRS supports delivery of Mission 4 'A sustainable West Yorkshire – making lives greener' of the West Yorkshire Plan. The LNRS also complements the [WY Plan and Climate and Environment Plan](#), and specifically the priorities Natural Environment NE01 and Climate Ready Strategy CR01.
- 3.4 The LNRS will align with several of the Mayoral's priorities and pledges, with a primary focus on the following three:
- Tackle the Climate Emergency and Protect our Environment
  - Build 5,000 Sustainable Homes
  - Support Local Businesses and Be a Champion for Our Regional Economy
- 3.5 LNRS will propose measures for habitat restoration and build on the aspirations of the Combined Authority's Blue Green Infrastructure Strategy (which includes measures such as new woodland areas and peat restoration among its delivery aims) and the West Yorkshire Low Emission Strategy (WYLES), which includes priorities relating to air quality.
- 3.6 Other strategies and priorities relevant to this project include the White Rose Forest Programme and emerging White Rose Forest Plan, Yorkshire Wildlife Trust *State of Nature* (to be published early 2024), Biodiversity Net Gain, district local plans, Natural England's Nature Recovery Projects, including plans to establish a new National Nature Reserve in Bradford district.

## The West Yorkshire LNRS

- 3.7 The Secretary of State for Department for Environment, Food & Rural Affairs (DEFRA) has appointed 'Responsible Authorities' to lead the preparation of the strategy for each area. The Combined Authority is the Responsible Authority for the first West Yorkshire LNRS.

## Scheme Summaries

<p><b>Local Nature Recovery Strategy</b> West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The 2021 Environment Act mandated 48 spatial Local Nature Recovery Strategies.</p> <p>The CA is the responsible authority for the first Local Nature Recovery Strategy for West Yorkshire. This will identify opportunities for nature’s recovery, specifically for boosting biodiversity and, where appropriate, wider environmental benefits (e.g. flood mitigation) and co-benefits (e.g. health). Local Nature Recovery Strategies will be re-published every 3-10 years.</p> <p>The scheme will develop the West Yorkshire Nature Recovery Strategy, comprising a statement of Biodiversity Priorities and a Habitat Map by mid-2025 to enable better understanding of the data to support species and habitat workstreams.</p> <p>The scheme is funded by the Combined Authority Shared Consultancy Budget, the Local Nature Recovery Strategy Seed Funding, and the Biodiversity Net Gain Grants.</p> <p><b><u>Impact</u></b></p> <p>The development of the LNRS will result in the production of a statement of biodiversity priorities and a habitat map, which will provide a better understanding of how to support local species and habitats. A public-facing website will enable information to be shared and there will be an increased awareness and understanding of the LNRS.</p> <p>Due to the nature of the scheme, a benefit cost ratio has not been calculated. Value for money is established through the wider benefits the LNRS unlocks and through associated health benefits.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision points 2 to 4 (business justification case) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £459,376</p> <p>Total value of Combined Authority funding - £459,376</p> <p>Funding recommendation sought - £459,376</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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## 4 Information

4.1 The Combined Authority's assurance framework requires that formal approval is given to the following elements of a scheme as part of its development:

- The progression of a scheme through a decision point to the next activity.
- Indicative or full approval to the total value of the scheme funding requested.
- The Combined Authority's entry into a funding agreement with the scheme's promoter.
- The assurance pathway and approval route for future decision points.
- The scheme's approval tolerances.

4.2 This report provides information required to enable the Combined Authority to approve each of the above elements.

### Projects in Stage 1: Assessment and Sequencing

4.3 There are no schemes to review at this stage.

### Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>Local Nature Recovery Strategy</b>
<b>Stage</b>	1 (assessment and sequencing) and 2 (project development)
<b>Decision Point</b>	2 to 4 (business justification)

Is this a key decision?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

### Background

4.4 The Environment Act 2021 requires that each responsible authority publishes their Local Nature Recovery Strategy (LNRS). The Combined Authority is the responsible authority for the first LNRS for West Yorkshire. This will identify opportunities for nature recovery, specifically for boosting biodiversity and wider environmental benefits such as flood prevention.

4.5 The West Yorkshire LNRS is a tool that will integrate regulatory compliance, strategic planning, engagement, evidence, and collaboration. It will commit to a sustainable future through a dynamic, adaptable approach that will help to agree priorities, identify high-impact opportunities to restore habitats and support wider nature recovery. The Strategy will focus on proposing measures that boost biodiversity, deliver wider environmental benefits and other associated benefits such as health benefits, where possible.

4.6 The key activities included in the production of the Strategy include:

- Mapping existing areas that are already legally protected, for example local nature reserves and local wildlife sites, and to map areas that could become of particular importance to support nature recovery.
- Collaborate with the local partner councils in West Yorkshire, the Peak District National Park and Natural England, as designated 'Supporting Authorities' in the LNRS process, and with other neighbouring responsible authorities to integrate the data that is held, which could include information on identified sites, species, habitats, topology, geology, and river systems.
- Engage and consult key stakeholder groups such as landowners, young people, communities of interest for example local businesses, 'green' groups and the public, to inform the strategy using local knowledge and identifying local priorities.
- Agreeing priorities for nature recovery with key stakeholders describing the area, identifying opportunities, and suggesting potential measures.
- Outlining a process for reviewing the impact in future Local Nature Recovery Strategies to record the longer-term effects of practical habitat creation and restoration.

4.7 The scheme objectives are:

- To develop and publish the West Yorkshire LNRS by mid-2025.
- To agree the format of the West Yorkshire LNRS governance structure to support the development and publication of the LNRS and have key parts of this in place by end of 2023.
- To identify, procure and use data to support decisions and provide evidence-base for proposed measures by the end of 2024.
- For a wide range of stakeholders to shape the LNRS at all stages by mid-2025.
- Raise awareness of the LNRS and opportunities to get involved by mid-2025.

4.8 A summary of the scheme's business case is included in **Appendix 1**.

### **Outputs and Outcomes**

4.9 The scheme outputs include:



- Development of the West Yorkshire LNRS, comprising a statement of biodiversity priorities and a habitat map by mid-2025.
- The creation of a steering group and sub-groups along with a professional board to develop a network of expertise.
- To develop a public-facing website to enable sharing of information.

4.10 The scheme outcomes include:

- The ability to support species and habitats through the gathering and understanding of data.
- Increased awareness and understanding of the LNRS.

4.11 Due to the nature of the scheme, a benefit cost ratio has not been calculated. Value for money is established through the wider benefits the creation of the LNRS produces.

### **Tackling the Climate Emergency Implications**

4.12 The scheme aims to support priorities relating to the climate and ecological emergency through promoting nature recovery, habitat creation and improving carbon sequestration which is the natural process where carbon is removed from the atmosphere through trees. In addition, the scheme promotes local access to nature which could reduce reliance on motorised travel thereby reducing carbon emissions.

4.13 The scheme prioritises the recovery and enhancement of nature and green spaces by emphasising the need to protect and enhance areas of significance for biodiversity.

4.14 The scheme recognises the role of infrastructure in achieving environmental goals and is likely to recognise the potential for infrastructure such as canal footpaths, and cycle paths to support connectivity between habitats and improve local access to nature.

### **Inclusive Growth Implications**

4.15 The scheme inclusive growth implications include:

- The scheme contributes to the inclusive growth agenda through the promotion of a sustainable environment that benefits all communities. Measures to enhance the natural environment, improve green spaces and improve health will benefit those communities that often face challenges with limited green space, and reduced access to nature.
- The strategy looks to enhance local green spaces which helps address health inequalities by promoting active lifestyles and reducing pollution. This particularly benefits groups with poor health.
- The strategy advocates for improved accessibility to green spaces and nature reserves by ensuring equitable access and promotes social equity and inclusion.



## **Equality and Diversity Implications**

- 4.16 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.
- 4.17 The LNRS will unlock opportunities for more equal access to quality green spaces which will allow the communities which were previously disconnected from nature due to factors such as income, mobility and transport inequality, to experience the benefits of natural environments.
- 4.18 The scheme recognises that green spaces and natural environments can have a positive impact on people's well-being and can enhance relationships between communities and the natural environment. The scheme will support these factors by suggesting measures to help communities to experience a sense of attachment to nature which will foster positive environmental behaviour.
- 4.19 The scheme promotes inclusivity by prioritising areas that need ecological restoration, ensuring that more people can access and enjoy natural spaces by identifying barriers. It will propose measures to make natural environments more accessible to a wider range of people.

## **Consultation and Engagement**

- 4.20 An inclusive and comprehensive approach to consultation and engagement will be adopted, ensuring representation from diverse stakeholders, including local communities, environmental groups, and business interests. This includes a bi-monthly bulletin, online website and targeted engagement for farmers and landowners, facilitating valuable input and feedback. Statutory consultation is planned for the draft LNRS towards the end of the schemes development.

## **Risks**

- 4.21 The scheme risks and mitigations include:
- The risk of a lack of stakeholder engagement caused by inadequate outreach or consultee fatigue which could result in reduced project support or a lack of diverse input. This is mitigated by ensuring there is sufficient stakeholder mapping and ongoing engagement with a variety of channels.
  - The risk of insufficient funding caused by budget constraints and economic fluctuations could result in delays or reduced project scope. This is mitigated by regular and early budget review against expenditure to identify potential shortfalls and accurate financial monitoring and reporting, and a robust budget contingency.
  - The risk of policy and guidance changes revising the scope and project parameters and could result in budget overruns, delayed timelines, and retrospective changes to the LNRS process. This is mitigated through a proactive change management process to swiftly address policy alterations or delays in guidance and through maintaining close

communication with Natural England and other stakeholders to anticipate and remain agile to any changes.

- The risk of conflicting priorities between key stakeholders which could result in unclear responsibilities, failure to agree the project priorities and cause delays. This is mitigated by enhancing the governance framework to clearly define roles, responsibilities, and decision-making processes among the project team and stakeholders, and through the implementation of regular reviews and communication channels.

### Costs

4.22 The total scheme costs are £459,376.

4.23 The Combined Authority's contribution is £459,376 which is comprised of:

- £50,000 from the Combined Authority Shared Consultancy Budget.
- £345,715 from the Department for Environment, Food & Rural Affairs.
- £63,661 from Biodiversity Net Gain Grants.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Policing, Environment & Place	30/03/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Policing, Environment & Place	31/08/2025

### Other Key Timescales

- Start of delivery 29/03/2024
- Completion date 31/08/2025

### Assurance Tolerances

4.24 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +25% of those outlined in this report, to allow for the potential for additional funding which may be allocated from government. Completion/service delivery date remains within +6 months of those outlined in this report.

## **Appraisal Summary**

- 4.25 The scheme demonstrates clear alignment with local, regional, and national policies and priorities, as well as alignment to Mayoral pledges, Combined Authority priorities and wider local and national government priorities.
- 4.26 There is a clear alignment with the inclusive growth agenda by promoting a sustainable environment that benefits all communities, particularly those in areas that have historically faced deprivation and inequalities.
- 4.27 The scheme will have a significant positive impact on the environment and on general wellbeing of the communities in West Yorkshire.

## **Recommendations**

- 4.28 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:
  - (i) The Local Nature Recovery Strategy scheme proceeds through decision points 2 to 4 (business justification case) and work commences on activity 5 (delivery).
  - (ii) Approval to the Combined Authority's contribution of £459,376 is given. The total scheme value is £459,376.
  - (iii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. Where required, any future committee level approvals are delegated to the Place, Regeneration and Housing Committee.

## **Projects in Stage 3: Delivery and Evaluation**

- 4.29 There are no schemes to review at this stage.

## **5 Tackling the Climate Emergency implications**

- 5.1 The Climate Emergency implications have been considered on all projects included in this report as part of their business case development.

## **6 Inclusive Growth implications**

- 6.1 The inclusive growth implications have been considered on all projects included in this report as part of their business case development.

## **7 Equality and Diversity implications**

- 7.1 Equality Impact Assessments (EqIA) have been undertaken on all projects included in this report as part of their business case development.

## **8 Financial implications**

- 8.1 The report seeks endorsement to expenditure from the available Combined Authority funding as set out in this report.

## **9 Legal implications**

- 9.1 The payment of funding to any recipient will be subject to a funding agreement being in place between the Combined Authority and the organisation in question.
- 9.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **10 Staffing implications**

- 10.1 A combination of Combined Authority and local partner council project resources are or are in the process of being identified and costed for within the schemes in this report.

## **11 External consultees**

- 11.1 Where applicable scheme promoters have been consulted on the content of this report.

## **12 Recommendations (Summary)**

### **Local Nature Recovery Strategy**

- 12.1 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:
- (i) The Local Nature Recovery Strategy scheme proceeds through decision points 2 to 4 (business justification case) and work commences on activity 5 (delivery).
  - (ii) Approval to the Combined Authority's contribution of £459,376 is given. The total scheme value is £459,376.
  - (iii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. Where required, any future committee level approvals are delegated to the Place, Regeneration and Housing Committee.

## **13 Background Documents**

- 13.1 None as part of this report.

## **14 Appendices**

[Appendix 1 – Local Nature Recovery Strategy – Business Case Summary](#)

## Project Overview

Project Title	<b>Local Nature Recovery Strategy</b>
Main Funding Programme	Local Nature Recovery Strategy seed funding 22-23 and grant 23-25, Biodiversity Net Gain grants 22-23 and 23-25, WYCA PEP consultancy budget
Current Forecast Project cost	£459,376
Funding Applied for from the Combined Authority	£459,376

## Scheme Description

The 2021 Environment Act mandated 48 spatial Local Nature Recovery Strategies. The CA is the responsible authority for the first Local Nature Recovery Strategy for West Yorkshire. This will identify opportunities for nature's recovery, specifically for boosting biodiversity and, where appropriate, wider environmental benefits (e.g. flood mitigation) and co-benefits (e.g. health). Local Nature Recovery Strategies will be re-published every 3-10 years.

The scheme will develop the West Yorkshire Nature Recovery Strategy, comprising a statement of Biodiversity Priorities and a Habitat Map by mid-2025 to enable better understanding of the data to support species and habitat workstreams.

## Business Case Summary

### Strategic Case

The 2021 Environment Act enacted a commitment to a Nature Recovery Network made in the government's 2018 25-year Environment Plan to restore and enhance nature across England. Local Nature Recovery Strategies are a key part of that.

The Local Nature Recovery Strategy provides the policy framework to direct change to achieve ecological enhancements across the region. It complements the West Yorkshire Plan and Climate and Environment Plan and proposes measures for habitat restoration, particularly where these could also deliver wider environmental benefits, such as flood resilience. It supports and builds on Combined Authority's Blue-Green Infrastructure Strategy which includes measures

such as new woodland areas and peat restoration among its delivery aims and the West Yorkshire Low Emission Strategy, which includes priorities relating to air quality. Further alignment with policies and strategies and the Mayoral pledges has been set out in the business case.

The Local Nature Recovery Strategy primarily focuses on the Mayoral priorities and pledges for 'Tackle the Climate Emergency and Protect our Environment' and 'Support Local Businesses and Be a Champion for Our Regional Economy'.

### Economic Case

Options for delivery were assessed as part of the business case submission leading to the selection of the preferred option. Due to the nature of the scheme, a benefit cost ratio has not been calculated and value for money is achieved through the strategic value of the scheme.

### Commercial Case

Procurement for work packages is ongoing and expected to be completed by mid-2024 to enable delivery of the scheme. Procurement is being undertaken in line with the Combined Authority's processes and procedures.

### Financial Case

The WY-Local Nature Recovery Strategy scheme has a total of £459,376.

Of this, Local Nature Recovery Strategy grants comprise £345,715 and Biodiversity Net Gain (BNG) grants comprise £63,661. The Combined Authority has contributed a further £50,000 from its internal consultancy budget.

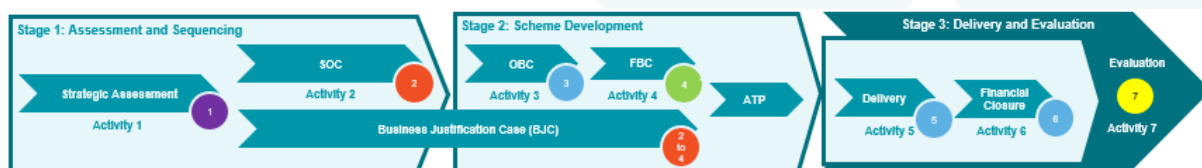
### Management Case

This scheme will be managed by the Combined Authority. A Steering Group comprising representatives from Supporting Authorities and key partnerships, including Rivers Trust, Environment Agency, Yorkshire Wildlife Trust, White Rose Forest, Natural England and others from the West Yorkshire districts, meets every three weeks to oversee the work of the small internal project team and sub-groups.

<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Better Homes Hub Project Approvals - Investment Priority 4 – Tackling the Climate Emergency and Environmental Sustainability</b>
<b>Director:</b>	Liz Hunter, Director of Policing, Environment & Place
<b>Author:</b>	Craig Taylor, Head of Strategic Portfolio Office

## 1 Purpose of this report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 4 – Tackling the Climate Emergency and Environmental Sustainability Investment, within the West Yorkshire Investment Strategy (WYIS), that have been considered at stages 1, 2 and 3 of the Combined Authority’s assurance process.



- 1.2 The recommendations can be found in Section 12 of this report.

## 2 Report

- 2.1 This report presents proposals for the progression of schemes through the Combined Authority’s assurance process in line with the Combined Authority’s Assurance Framework. Further details on the schemes summarised below can be found as part of this report.

## 3 Investment Priority 4 (IP4) - Tackling the Climate Emergency and Environmental Sustainability

- 3.1 Housing is responsible for 3.4 million tonnes (around 30%) of carbon dioxide each year in West Yorkshire, the majority of which comes from using fossil fuels to heat homes.<sup>1</sup>
- 3.2 The Better Homes Hub (BHH) programme is being developed to promote, facilitate and deliver retrofit of housing across all housing tenures in West Yorkshire with a vision that “Everyone in West Yorkshire can live in a warm,

<sup>1</sup> UK local authority and regional greenhouse gas emissions national statistics, 2005 to 2021 - Department for Energy Security and Net Zero

comfortable and low carbon home”. This includes households that rent their home from social or private landlords, have a mortgage/loan on their home, or that own their home outright, and collectively will be referred to as “multi-tenure” in this report.

- 3.3 The retrofitting of housing includes measures which improve the heat efficiency and air tightness of homes, up to a good level of thermal efficiency, for example double and triple glazing, loft, wall, and ground floor insulation and the installation of renewable technology, including solar panels, heat pumps.
- 3.4 Objective 2 of the BHH programme focusses on “Delivering retrofit projects in West Yorkshire that build momentum, strengthen the supply chains, and create new delivery models”. This has resulted in close partnership working with social housing providers across the region on the government funded Social Housing Decarbonisation Fund (SHDF) programmes, and between the Combined Authority and partner Councils on the development of Area-based Schemes (ABS).
- 3.5 Through the SHDF programmes, over £40,000,000 has been committed for investment in social housing retrofit throughout West Yorkshire. Over £15,000,000 of this is co-funding from the social housing providers themselves who have determined the scale and location of the properties to be retrofitted.
- 3.6 To date through the SHDF programme, over 1400 social homes in Wakefield have benefitted from wall and floor insulation, whilst Kirklees Council have invested in a wide range of energy saving and decarbonisation measures, including insulation, Solar Photo Voltaic and heat pump installations in over 400 homes. In Leeds, 500 social homes will receive insulation by March 2025 raising their energy efficiency to Energy Performance Certificate (EPC) rating of C and in Bradford over 700 households, many suffering from fuel poverty, have benefitted from insulation. A further 700 homes in Calderdale, including old stone terraced properties, have also benefitted from insulation.
- 3.7 Learnings from the delivery of the SHDF programmes are providing key insights for the emerging Area Based Scheme programme (which supports multi-tenure areas) and development of delivery blueprints and efficiencies which will enable retrofit to be scaled up and across the region. Each Area Based Scheme will focus on a different element of innovation.
- 3.8 Since February 2023, the Combined Authority’s BHH programme team have been meeting regularly with officers of each partner Council to scope and investigate potential technological innovations for each Area Based Scheme. To date, a business case for a scheme based in Calderdale scheme was approved at Combined Authority on 7 December 2023 and will begin delivery in March 2024. This scheme is focussed on hybrid wall insulation.
- 3.9 A Leeds based scheme being considered as part of this approvals paper.
- 2.6. Development of the remaining schemes in Wakefield, Bradford and Kirklees is ongoing, and these are expected to be launched in 2025 subject to future Committee approvals.



## Scheme summaries

<p><b>Better Homes Hub (BHH) Area-Based Scheme (Leeds – Part 1)</b> Armley, Leeds</p>	<p><b><u>Scheme description</u></b></p> <p>This scheme is Part 1 of the Leeds area-based scheme within the wider Better Homes Hub (BHH) Programme. The scheme looks to implement whole house insulation on up to 100 back-to-back Victorian terraces in Armley, Leeds.</p> <p>This scheme will also bring together different Government funding sources into one delivery package and seek a solution to providing low carbon heating to these properties, to help achieve a near net-zero retrofit standard.</p> <p>The scheme is funded by the Single Investment Fund (SIF), Investment Priority 4 gainshare allocation.</p> <p><b><u>Impact</u></b></p> <p>Part 1 will deliver whole house insulation to 100 properties resulting in energy savings and reduction in costs related to energy, supporting the Combined Authority's aim of a net zero carbon economy.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 0.89:1.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 to 4 (business justification) and work to commence on activity 5 (delivery).</p> <p>Total value of the scheme - £4,372,241</p> <p>Total value of Combined Authority funding - £1,734,906</p> <p>Overall funding recommendation sought - £1,734,906</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Better Homes Hub</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The Better Homes Hub (BHH) programme has been developed to promote, facilitate, and deliver retrofit of housing across West Yorkshire.</p> <p>The scheme is funded by the Single Investment Fund (SIF), Investment Priority 4 gainshare allocation</p> <p><b><u>Impact</u></b></p> <p>The programme will lead to reductions in CO2 emissions, domestic energy use and fuel poverty across multi tenures. A value for money assessment will be completed as part of each scheme's individual business case development.</p> <p><b><u>Decision sought</u></b></p> <p>Approval of the change request to release development costs of £240,000 of Combined Authority funding to enable programme evaluation and to undertake a feasibility study for the Better Homes Hub Area-Based Scheme (Leeds – Part 2).</p> <p>Total value of the scheme - £17,587,834</p> <p>Total value of Combined Authority funding - £17,587,834</p> <p>Overall funding recommendation sought – £240,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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3.10 Since the Combined Authority's meeting on 1 February 2024, the following decision points and change requests have been assessed in line with the Combined Authority's assurance process and approved through the agreed delegation to the Climate, Energy and Environment Committee at its meeting on 13 February 2024. The decisions were made by the Climate, Energy and Environment Committee following a recommendation from Combined Authority Director of Policing, Environment & Place.

3.11 The full agenda and papers for the meeting can be found on the Combined Authority website [here](#).

<p><b>Sheepscar Beck Refurbishment</b></p>	<p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £620,104</p> <p>Total value of the scheme: £1,563,401</p> <p>Total value of Combined Authority funding: £620,104</p>
<p><b>Brighouse Flood Alleviation Scheme Phase 1</b></p>	<p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £4,499,000</p> <p>Total value of the scheme: £30,809,000</p> <p>Total indicative value of Combined Authority funding: £4,499,000</p>

<b>Albert Street Flood Alleviation Scheme</b>	<p>Approval to proceed through decision point 2 to 4 (business justification case) and work commences on activity 5 (delivery).</p> <p>Funding approved: £526,176</p> <p>Total value of the scheme: £526,176</p> <p>Total value of Combined Authority funding: £526,176</p>
<b>Better Neighbourhoods</b>	<p>Approval to the change request for additional funding of up to £150,000, taking the scheme costs and Combined Authority contribution from £2,060,000 to £2,210,000.</p> <p>Funding approved: £150,000</p> <p>Total value of the scheme: £2,210,000</p> <p>Total value of Combined Authority funding: £2,210,000</p>

#### **4 Information**

4.1 The Combined Authority's assurance framework requires that formal approval is given to the following elements of a scheme as part of its development:

- The progression of a scheme through a decision point to the next activity.
- Indicative or full approval to the total value of the scheme funding requested.
- The Combined Authority's entry into a funding agreement with the scheme's promoter.
- The assurance pathway and approval route for future decision points.
- The scheme's approval tolerances.

4.2 This report provides information required to enable the Combined Authority to approve each of the above elements.

#### **Projects in Stage 1: Assessment and Sequencing**

4.3 There are no schemes to review at this stage.

## Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>Better Homes Hub (BHH) Area-Based Scheme (Leeds – Part 1)</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 to 4 (business justification)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

### Background

- 4.1 The scheme covers the Leeds district area and is part of Phase 1 of the wider area-based retrofit schemes which are being delivered against the Better Homes Hub Programme Objective 2. Objective 2 aims to deliver retrofit projects in West Yorkshire that build momentum, strengthen supply chains, and create new delivery models. Where possible, one area-based scheme will be delivered in each of the West Yorkshire district areas.
- 4.2 The area-based schemes will pilot a range of retrofit measures across an area or/and street to test the level of interventions that can be made to properties, to understand the impact these measures will have on residents' living conditions and their energy/fuel bills, and how to achieve efficiencies in delivery. This will act as a blueprint to future schemes with substantial learning derived from the development and delivery of these.
- 4.3 This scheme seeks funding to deliver Part 1 of the Leeds area-based scheme, in Armley, Leeds, and aims to deliver 100 whole house insulation retrofits.
- 4.4 The scheme will involve a disrepair package to ensure that all homes are weathertight prior to insulation works starting. This will vary by property but is likely to include repointing walls and chimneys, new roof or roof repairs, new rainwater goods, and a damp-proof course if absent to avoid damp issues. An insulation package will then be delivered to significantly improve heat retention, comprising a property-specific mix of measures with the expectation that all will receive external wall insulation and room in roof insulation, but some properties will receive underfloor insulation if suitable.
- 4.5 Leeds City Council will bring together a package of different government funding sources to make the scheme affordable for residents. Each household

will be assessed to understand which sources of other government funding schemes can be best utilised to fund works installed onto their property and to determine the level of homeowner contributions. The scheme will test the best methods of maximising various funding sources to inform future schemes.

- 4.6 Delivery will first commence with council owned homes to demonstrate the final finish of whole house insulations and to encourage privately owned and rented properties to engage with the scheme through this initial work.
- 4.7 The scheme level objectives are:
- To deliver a whole house insulation to up to 100 back-to-back Victorian terraces in the Cedar area in Armley, Leeds, by September 2025.
  - To bring together a package of different funding sources to make this scheme affordable, by September 2025. This will help develop an understanding of how different funding sources can be best sequenced and maximised during the delivery of complex retrofit schemes.
- 4.8 Part 2 of the scheme will seek to install a low carbon technology such as a Ground Source Heat Pump, however a feasibility study will be commissioned first to investigate the viability and legal, planning, and commercial implications of installing a Ground Source Heat Pump, to inform Part 2 of the scheme. Together, Part 1 and Part 2 would reduce carbon emissions arising from properties and deliver a near net-zero carbon retrofit standard.
- 4.9 Development funds are being requested in a separate Change Request to the Better Homes Hub Programme at this meeting to progress with the feasibility study to undertake Part 2 of the Leeds area-based scheme. The funding will enable a detailed feasibility study to be commissioned on the potential installation of a low carbon technology such as a Ground Source Heat Pump. Part 1 and Part 2 collectively will aim to deliver a near net-zero carbon retrofit standard to properties.
- 4.10 Separate business cases will be submitted for Part 2 of the Leeds area-based scheme and also for the wider area-based retrofit schemes in the other West Yorkshire districts.
- 4.11 A summary of the scheme's business case is included at Appendix 1.

### **Outputs and Outcomes**

- 4.12 The scheme outputs are:
- To deliver energy retrofit measures in the form of whole home insulation to 100 back-to-back Victorian terrace houses in the Cedar area in Armley, Leeds, by September 2025.
  - To deliver an estimate of 832,381 kWh of forecasted energy savings by improving energy efficiency of the 100 homes that receive retrofits.
  - To deliver repairs and preparatory works, insulations, and new window and door installations at the properties.

- To bring together a package of different public funding sources to make the scheme affordable.

4.13 The scheme outcomes are:

- To bring together a package of different public funding sources to maximise affordability of the scheme for residents and improve the level of outputs able to be delivered by the scheme.
- To reduce Kw/h in space heating demand by an estimate of 832,381 kWh per year, increasing the energy efficiency of homes.
- To reduce the proportion of households in fuel poverty by delivering energy efficiency measures that create a forecast of savings of £66,590 per year to total household bills.
- To reduce the percentage of income spent on energy bills, resulting in a comparative financial saving of up to £665 in gross disposable household incomes each year.
- To deliver a reduction in carbon emissions of a forecast of 174.80 tCO<sub>2</sub> per year.
- To improve thermal comfort for residents, and their health and wellbeing, thus leading to an estimate of £1,836,341 of income saved in relation to health needs each year.
- To improve understanding of the approaches and activities that can support whole scale retrofitting for future schemes.

### **Tackling the Climate Emergency Implications**

- 4.14 The scheme will support resilience against the climate emergency by creating a reduction in domestic housing energy consumption by an estimated 832,381 kWh per year, delivering savings of approximately £66,590 a year across the 100 houses, and a reduction in domestic housing CO<sub>2</sub> emissions by up to 174.80 tCO<sub>2</sub> per year. By enabling improvements in the energy efficiency of homes, the scheme will directly reduce carbon emissions from housing.
- 4.15 27% of carbon emissions in Leeds come from its building stocks, with 63% of homes having an EPC energy rating of Band D or worse. The scheme will improve these figures.
- 4.16 Housing is responsible for 3.4 million tonnes (around 30%) of carbon dioxide each year in West Yorkshire, the majority of which come from using fossil fuels to heat homes. This scheme will deliver whole house retrofits to 100 terraces in Leeds and provide important learning for scaling up opportunities in future projects.
- 4.17 At 18%, West Yorkshire has the second highest level of fuel poverty in England (compared with 13% nationally). By improving the energy efficiency of homes, the scheme will produce household income savings, and reduce the impacts of fuel poverty in West Yorkshire.
- 4.18 A Stage 2 Carbon Impact Assessment has been submitted with the Business Case for this scheme.

## **Inclusive Growth Implications**

4.19 The scheme inclusive growth implications include:

- A reduction in fuel poverty, a problem faced by households living on a low income in a home which cannot be kept warm at reasonable cost; the issue has become more pressing following the cost-of-living crisis where increases in energy costs have caused the number of households in fuel poverty to increase, and is prominent in the North of England with around 18% of households in West Yorkshire living in fuel poverty, compared with 13% nationally.
- The poor quality of people's homes also has a knock-on negative impact on physical and mental health. In Winter 2019-20 there was an estimated 28,300 excess Winter deaths in the UK, of which approximately a third were considered attributable to living in a cold home. Households with children, the over-60s, low-income households, with people from minority ethnic backgrounds, and those with pre-existing illnesses, are all more likely to be disproportionately affected by cold and damp and are more likely to live in these conditions with limited resources to pay for fuel. By improving energy efficiency of homes, the scheme will improve the quality of people's living situations, particularly for those who are more vulnerable.

## **Equality and Diversity Implications**

4.20 A Stage 2 Equality Impact Assessment (EqIA) has been undertaken for the wider Better Homes Hub Programme and equality and diversity impacts taken account of as part of the development of this scheme. The EqIA will be regularly reviewed and updated and impacts taken account of as other schemes continue to progress through the Programme and learnings are captured.

4.21 The Leeds area-based scheme will support equality and diversity, ensuring that no one is disadvantaged as a result of the transition to net zero, particularly those most vulnerable in society, and that appropriate support is provided to enable everyone to participate in a fair, equal, and inclusive net-zero carbon economy. By offering a mixture of financial support packages to residents, dependent upon the outcome of the 'household income assessment', the scheme is inclusive to everyone.

4.22 Households with children, the over-60s, low-income households, with people from minority ethnic backgrounds, and those with pre-existing illnesses, are all more likely to be disproportionately affected by cold and damp and are more likely to live in these conditions with limited resources to pay for fuel. By improving energy efficiency of homes, the scheme will improve the quality of people's living situations, particularly for those who are more vulnerable.

## **Consultation and Engagement**

- 4.23 The Chief Officer of the Climate, Energy and Green Spaces department at Leeds City Council has been informally briefed on the scheme and is fully supportive. Leeds City Council will seek Executive board approval, on 13 March 2024, to request authority to accept and invest funding from the Combined Authority, on 14 March 2024.
- 4.24 This approval will also confirm that match funding such as Housing Revenue Account budget funding is in place, and that commitment from Housing Leeds (Leeds City Council's housing provider), is in place to include their properties in this scheme.
- 4.25 Engagement with residents and landlords will be the responsibility of the Principal Contractor chosen to deliver the scheme, who will use trained members of staff to provide quality customer liaison and support, to communicate the benefits of the scheme effectively to residents, and to work closely with Leeds City Council to achieve residents' agreements, privacy notices, and pre- and post- installation surveys/satisfaction questionnaires. Customer service care calls during and following the completion of works and responses to customer enquiries and concerns during and after installation will be part of this package of support delivered by the contractor.
- 4.26 The scheme will be promoted through the Council's internet and social media channels, direct mailings, resident engagement events, and additional promotion materials.

## **Risks**

- 4.27 The scheme risks and mitigations are:
- The cost-of-living crisis, inflation, and rising costs of retrofits result in financial challenges, and little appetite for investment by able-to-pay landlords and therefore funding is not realised to deliver the full potential of the scheme. To mitigate this risk, pre-supplier engagement has taken place to inform budget estimates, and stakeholder engagement/customer research has been undertaken. Learnings from previously delivered schemes are also informing the development of this scheme, and the emphasis on marketing correctly to customers; also, a contingency budget has been included in the programme cost estimates.
  - The Combined Authority has a direct link to the delivery of measures in people's homes and therefore aftercare becomes the responsibility and high-risk role of the Combined Authority. This risk is being mitigated by transferring risk to contractors and installers of a good reputation; clauses in the tender contract will make direct reference to quality aftercare.
  - The supply chain is unable to meet delivery timeframes and quality levels, so customers do not receive the retrofit measures as planned. A supplier strategy and engagement plan have mitigated this risk. All three contractors of the chosen procurement framework have been financially



vetted, and the chosen contractor will be responsible for engagement and sub-contracting.

- Trust issues from residents stemming from information overload and negative experiences with trades people. The complex nature of retrofitting may add to this issue. To mitigate, clear communications and engagement strategies and plans will be implemented.
- The area may be deemed unsuitable for Part 2 of the Leeds area-based scheme, putting funding for this element at risk. To mitigate, £50,000 development costs are being requested in a separate, programme-level change request to enable a feasibility study to be undertaken. This is also why the scheme and funding request has been split into two parts.
- Residents signing up to Part 1 of the scheme may not sign up to Part 2. If there is a long gap between the delivery of Part 1 and Part 2 of works, residents may become disengaged on the scheme, and the project could lose an opportunity to fully decarbonise these properties. It is preferable to avoid residents being required to provide access to their house on 2 separate occasions for works to be delivered, which may cause frustration. Therefore, the scheme is seeking delegated authority of approval to Part 2 of the scheme to help ensure that momentum generated during resident engagement of Part 1 will be maintained for Part 2 of the scheme.

### **Costs**

- 4.28 The total cost of the Leeds area-based scheme (Part 1 and Part 2) is £6,930,041 with £3,888,381 of this amount being Combined Authority funding.
- 4.29 This scheme is Part 1 of the Leeds area-based scheme. The total scheme costs are £4,372,241.
- 4.30 The Combined Authority's contribution being requested to deliver Part 1 is £1,734,906 from the Single Investment Fund, Investment Priority 4.
- 4.31 The remaining funding for Part 1 is £2,637,335 from a mixture of match funding, including homeowner/landlord contributions, Energy Company Obligation (ECO) funding, Home Upgrade Grant (HUG) funding, and Housing Revenue Account funding. The amount of each contribution is yet to be confirmed. The level of Housing Revenue Account funding from Leeds City Council will be confirmed in March 2024. Eligibility of homeowners to access ECO and HUG funding will be identified in a 'means assessment' which will then also determine the level of homeowner contributions.
- 4.32 The current forecasted contribution from the Combined Authority for Part 2 of the scheme is £2,153,475 with indicative total scheme costs for Part 2 being £2,557,800, however costs will be further developed through the submission of a separate Business Case later this year.

### Future Assurance Pathway and Approval Route (Part 1)

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision Combined Authority's Director of Policing, Environment & Place (PEP)	30/12/2025

### Future Assurance Pathway and Approval Route (Part 2)

Assurance pathway	Approval route	Forecast approval date
2 to 4 (Business Justification)	Recommendation: Combined Authority's Portfolio Investment Panel Decision Combined Authority's Chief Executive (CE)	28/02/2025
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision Combined Authority's Director of Policing, Environment & Place (PEP)	01/06/2026

### Other Key Timescales

- Resident engagement will commence first with social housing for Part 1 of the area-based scheme in Leeds. This will commence on 30 April 2024.
- The contract will be awarded to the Principal Contractor to deliver the scheme in May 2024.
- Installation of Part 1 scheme measures will commence first on social housing in September 2024.
- Part 1 of the scheme is expected to be completed by 30<sup>th</sup> September 2025.
- Evaluation of Part 1 measures will commence in September 2025.
- A Final Evaluation Report, covering both Part 1 and Part 2 of the scheme, will be delivered in March 2027.

### Assurance Tolerances

4.33 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

<b>Assurance tolerances</b>
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Combined Authority funding remain within +10% of those outlined in this report.  
Completion/service delivery date remains within +6 months of those outlined in this report.  
Outputs remain within -10% of those outlined in this report.

## **Appraisal Summary**

- 4.34 The scheme demonstrates strong strategic alignment to the Objectives of the wider Better Homes Hub programme and the Climate and Environment Plan developed by the Combined Authority using learnings from the Carbon Emissions Reduction Pathways study, all of which emphasise the need to prioritise domestic energy retrofits to ensure the region is able to meet net zero carbon targets declared by the Combined Authority and the region's Local Authorities.
- 4.35 The scheme is Part 1 of the Leeds area-based scheme that sits within Phase 1 of the Better Homes Hub programme and will aim to achieve 100 whole house insulation retrofits on back-to-back Victorian properties in Armley, Leeds to improve energy efficiency and reduce carbon emissions. The scheme will support the development of key learnings to enable domestic retrofit schemes to be delivered at scale in the future and will help to identify the best blend of funding sources to make schemes affordable for homeowners. The area has been chosen for the Leeds area-based scheme due to the low energy ratings of properties in the area, the levels of high deprivation, and the promise to implement a similar scheme previously which failed to complete.
- 4.36 Development funds are currently going through the Assurance Framework via a separate Change Request to support the development of a Business Case to implement Part 2 of the Leeds area-based scheme. Together, Part 1 and Part 2 will achieve near net zero domestic retrofits; Part 1 with a focus on repairs and preparatory works, insulation works, and new window and door installations, and Part 2 with a focus on achieving a low carbon heating solution by installing ground source heat pumps.
- 4.37 During the Delivery Phase of the scheme, a clear governance structure and Board will need to be established internally by Leeds City Council for reporting and managing the scheme.
- 4.38 The Monitoring Plan will also need to be further developed for the scheme once property surveys have been completed by the chosen contractor and more accurate figures are known in terms of savings that will be produced by the scheme.
- 4.39 The preferred contractor will also be responsible for developing a Resident Engagement Plan, Gantt Chart, and financial 'needs assessment' for homeowners as part of the scheme, to determine the level of homeowner contributions to each property installation; this will be developed in collaboration with Leeds City Council.

## Recommendations

4.40 The Combined Authority approves that:

- (i) The Better Homes Hub (BHH) Area-Based Scheme (Leeds – Part 1) scheme proceeds through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).
- (ii) Approval to the Combined Authority’s contribution of £1,734,906 is given. The total scheme value is £4,372,241.
- (iii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £1,734,906.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Climate, Energy and Environment Committee.

<b>Project Title</b>	<b>Better Homes Hub</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	Change request (activity 2)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.41 The Better Homes Hub programme has been developed to promote, facilitate and deliver retrofit of housing across all housing tenures in West Yorkshire. This includes households that rent their home from social or private landlords, have a mortgage / loan on their home, or own their own home outright and will be referred to as multi tenure, in this report.
- 4.42 The retrofitting of housing includes measures which improve the heat efficiency and air tightness of homes, up to a good level of thermal efficiency, for example double and triple glazing, loft, wall, and ground floor insulation and the installation of renewable technology, including solar panels, heat pumps.

- 4.43 The programme will lead to reductions in CO2 emissions, domestic energy use and fuel poverty across multi tenures, which will contribute to tackling the climate emergency.
- 4.44 Conservative estimates indicate that up to £20.4 billion is needed to retrofit homes to a good level of thermal efficiency, so any moderate capital investment is short term in its approach.
- 4.45 The long-term Better Homes Hub programme is expected to be delivered in three phases. Phase 1 is covered by the strategic outline case and will be funded from the gainshare allocation for investment priority 4 - Tackling the Climate Emergency and Environmental Sustainability. Funding to support the later phases of the programme in later years will be required beyond the current three-year gainshare funding period.
- 4.46 The Better Homes Hub programme gained decision point 2 (strategic outline case) approval and approval for work to commence on individual business cases at the Combined Authority meeting on 22 June 2023. Development costs were also approved to secure staffing resources, consultancy support, undertake research work, develop individual scheme business cases, and funds to deliver the Local Energy Advice Demonstrator element of the programme.
- 4.47 A change request was approved in December 2023 for further development costs from the Combined Authority to acquire staffing resources to support delivery of the objectives.
- 4.48 Approval is now sought via this change request for further development costs to enable the Better Homes Hub programme to be evaluated as part of the Domestic Net Zero evaluation framework. This evaluation framework will bring together the Better Homes Hub and domestic solar schemes to ensure that the methods of data collection and metrics provide for whole programme comparability, whilst also ensuring learning from individual projects can be applied across the full Domestic Net Zero package.
- 4.49 Development costs will also be used to commission a feasibility study to investigate the risks, costs and delivery arrangements that need to be considered before a shared low carbon technology is introduced in Part 2 of the Leeds Area based scheme (subject to separate approvals).

### **Outputs and Outcomes**

- 4.50 The scheme outputs are:
- To deliver energy retrofit measures in the form of whole home insulation. Provide five multi-tenure retrofits in a local area / street demonstrator by March 2026 to demonstrate the benefits of retrofit to all and understand the various challenges facing residents in domestic retrofit.
  - Deliver the multiple benefits of retrofit activity to social housing by continuing the strong progress of Social Housing Decarbonisation Fund for those homes containing some of the most excluded in our region.

- Development of options for the creation of a One Stop Shop to provide a single point of advice and support for all tenure householders on retrofit measures that could be delivered.
- Ensure retrofits are completed and certified to the right quality standards, and in accordance with the British Standard for retrofits which is PAS2035.
- Provide data and learning on all housing tenure support needs and benefits to inform the scaling up and roll out of future waves across all housing.

4.51 The scheme outcomes are:

- Energy efficiency fabric improvements to housing stock in West Yorkshire.
- Increased number of domestic retrofits and renewable installations beyond current Central Government funding.
- Reduction in carbon emissions from domestic properties.
- Reduction in energy consumption in domestic properties.
- Reduction in the number of households experiencing fuel poverty and associated health inequalities.
- Energy efficiency fabric improvements to housing stock in West Yorkshire.
- Increased number of domestic retrofits and renewable installations beyond current Central Government funding.
- Reduction in carbon emissions from domestic properties.
- Reduction in energy consumption in domestic properties.
- Reduction in the number of households experiencing fuel poverty and associated health inequalities.

### **Tackling the Climate Emergency Implications**

4.52 This programme will contribute towards reductions in carbon emissions through raising the profile of retrofit measures that can be introduced.

### **Inclusive Growth Implications**

4.53 The scheme inclusive growth implications include:

- The programme will apply to all households including those living in poor housing in all tenures.
- Completing retrofits will help lift people out of fuel poverty by reducing energy emissions and therefore costs.

## **Equality and Diversity Implications**

- 4.54 An Equality Impact Assessment (EqIA) was undertaken for the programme and equality and diversity impacts are being taken into account of as part of the development of individual schemes and their business cases.
- 4.55 The programme will be delivered across West Yorkshire including the most deprived areas.
- 4.56 The programme will support residents with differing needs, to improve the energy efficiency of their homes. For example, for some groups, the intervention may require information, advice, and signposting. Other groups will require more support such as translation skills and signposting to financial support.

## **Consultation and Engagement**

- 4.57 Options for the programme were developed as part of the strategic outline case submission and workshops were held with stakeholders to ensure the programme will deliver the required outputs.
- 4.58 Future consultation is planned as part of individual scheme business case development.

## **Risks**

- 4.59 The programme risks and mitigations are:
- Increased costs due to inflation and rising costs through the supply chain. This is mitigated by procuring a financial consultant for advice on the scheme costs and monitoring scheme costs throughout programme development and delivery.
  - Insufficient interest in the market or inability to procure an appropriate consultant to provide support in the development of the programme. This is being mitigated by engaging with the market in advance to locate multiple consultants and to build interest before the opportunity to bid is finalised.

## **Costs**

- 4.60 The total programme costs are £17,587,834.
- 4.61 The Combined Authority's contribution is up to £17,587,834, comprising up to £16,750,000 from the Single Investment Fund (SIF), IP4 gainshare allocation and £837,834 from the Local Energy Advice Demonstrator programme.
- 4.62 The Better Homes Hub programme gained decision point 2 (strategic outline case) approval and approval for work to commence on individual business cases, at the Combined Authority meeting on 22 June 2023.
- 4.63 Approval is now sought via this change request for further development costs of £240,000, to support the development and delivery of schemes:

- Programme Evaluation: £190,000
- Feasibility Study for Part 2 of the Leeds Area based scheme: £50,000

4.64 Subject to approval, this takes the total programme approval to date to £5,228,585 which is broken down as follows:

Funding Source	Amount	Approval
Single Investment Fund	£718,293	CEP Wave 1 Portfolio
	£910,000	BHH Programme SOC
	£2,522,458	BHH Change Request (December 2023)
	£240,000	BHH Change Request (March 2024)
Local Energy Advice Demonstrator	£837,834	BHH Programme Change Request (Originally £1,650,000)
Programme Approval Total	£5,228,585	

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision Combined Authority's Director of Policing, Environment & Place	31/03/2026

### Other Key Timescales

- March 2026 - Completion of delivery of Phase 1 of the programme
- March 2027 - Programme evaluation of Phase 1 of the programme.  
Assurance Tolerances

### Assurance Tolerances

4.65 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	Changed Request Approved	Requested Change Request Approval	Within tolerance?
Date	22/06/23		07/12/23	14/03/24	



<b>Total Cost</b>	£18,425,000		£17,587,834	£17,587,834	
<b>Combined Authority Funding</b>	+10%	£18,425,000	£17,587,834	£17,587,834	Y
<b>Completion Date (DP5)</b>	6 months	31/03/26	31/03/26	31/02/26	Y
<b>Outputs and Benefits</b>	-10%	As per report	As per report	No change	Y

4.66 The revised assurance tolerances for the recommended approval in this report are:

<b>Assurance tolerances</b>
Combined Authority funding remain within +10% of those outlined in this report.
Completion/service delivery date remains within +6 months of those outlined in this report.
Outputs remain within -10% of those outlined in this report.

### Appraisal Summary

- 4.67 The Better Homes Hub (BHH) programme has a strong strategic value for West Yorkshire. It is recognised that a quarter of the region's carbon emissions come from homes and there is a clear need for housing retrofits and energy efficient measures to be introduced.
- 4.68 A change request to the programme approval is being sought at this time, to procure a consultant to evaluate the Better Homes Hub programme as part of the Domestic Net Zero evaluation framework. Funding is also being requested to commission a detailed feasibility study, to help inform delivery of Part 2 of the Leeds Area based scheme.
- 4.69 Further appraisal has been or will be undertaken as schemes progress individually through the assurance process.

### Recommendations

- 4.70 The Combined Authority approves that:
- (i) The change request to release development costs of £240,000 of Combined Authority funding to enable programme evaluation and to undertake a feasibility study for the Better Homes Hub Area-Based Scheme (Leeds – Part 2). This takes the total approval to £5,288,585. The total programme cost is £17,587,834.
  - (ii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £50,000.
  - (iii) That delegated authority be granted to the Director of Policing, Environment & Place, to approve the reallocation of spend within the

wider Better Homes Hub Programme and to enter into Grant Funding Agreements / letters between the Combined Authority and the local authority partners and suppliers.

- (iv) Future approvals are made in accordance with the assurance pathway and approval route and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Climate, Energy and Environment Committee

### **Projects in Stage 3: Delivery and Evaluation**

4.71 There are no schemes to review at this stage.

## **5 Tackling the Climate Emergency implications**

5.1 The Climate Emergency implications have been considered on all projects included in this report as part of their business case development.

## **6 Inclusive Growth implications**

6.1 The inclusive growth implications have been considered on all projects included in this report as part of their business case development.

## **7 Equality and Diversity implications**

7.1 Equality Impact Assessments (EqIA) have been undertaken on all projects included in this report as part of their business case development.

## **8 Financial implications**

8.1 The report seeks endorsement to expenditure from the available Combined Authority funding as set out in this report.

## **9 Legal implications**

9.1 The payment of funding to any recipient will be subject to a funding agreement being in place between the Combined Authority and the organisation in question.

9.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **10 Staffing implications**

10.1 A combination of Combined Authority and local partner council project, programme and portfolio management resources are or are in the process of being identified and costed for within the schemes in this report.

## **11 External consultees**

11.1 Where applicable scheme promoters have been consulted on the content of this report.

## **12 Recommendations (Summary)**

### **Better Homes Hub (BHH) Area-Based Scheme (Leeds – Part 1)**

12.1 The Combined Authority approves that:

- (i) The Better Homes Hub (BHH) Area-Based Scheme (Leeds – Part 1) scheme proceeds through decision point 2 to 4 (Business Justification) and work commences on activity 5 (delivery).
- (ii) Approval to the Combined Authority's contribution of £1,734,906 is given. The total scheme value is £4,372,241.
- (iii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £1,734,906.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Climate, Energy and Environment Committee.

### **Better Homes Hub**

12.2 The Combined Authority approves that:

- (i) The change request to release development costs of £240,000 of Combined Authority funding to enable programme evaluation and to undertake a feasibility study for the Better Homes Hub Area-Based Scheme (Leeds – Part 2). This takes the total approval to £5,288,585. The total programme cost is £17,587,834.
- (ii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £50,000.
- (iii) That delegated authority be granted to the Director of Policing, Environment & Place, to approve the reallocation of spend within the wider Better Homes Hub Programme and to enter into Grant Funding Agreements / letters between the Combined Authority and the local authority partners and suppliers.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Climate, Energy and Environment Committee

## **13 Background Documents**

13.1 None as part of this report.

## **14 Appendices**

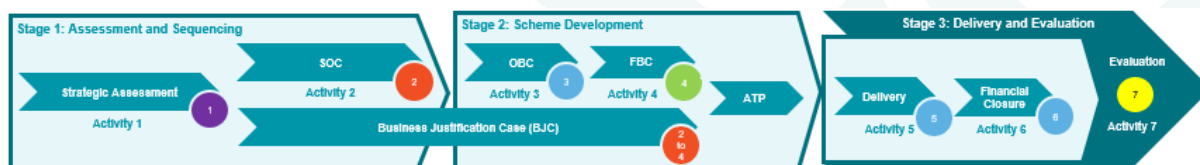
[Appendix 1 – Better Homes Hub - Area-Based Schemes \(Phase 1 – Leeds\) Business Case Summary](#)

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<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Project Approvals - Investment Priority 5 – Delivering Sustainable, Integrated, Inclusive and Affordable Transport</b>
<b>Director:</b>	Simon Warburton, Executive Director, Transport
<b>Author:</b>	Craig Taylor, Head of Strategic Portfolio Office

## 1 Purpose of this report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 5 – Delivering Sustainable, Integrated, Inclusive and Affordable Transport, within the West Yorkshire Investment Strategy (WYIS), that have been considered at stages 1, 2 and 3 of the Combined Authority’s assurance process.



- 1.2 The recommendations can be found in Section 12 of this report.

## 2 Report

- 2.1 This report presents proposals for the progression of schemes through the Combined Authority’s assurance process in line with the Combined Authority’s Assurance Framework. Further details on the schemes summarised below can be found as part of this report.

## 3 Investment Priority 5 (IP5) - Delivering Sustainable, Integrated, Inclusive and Affordable Transport

- 3.1 The West Yorkshire Investment Strategy (WYIS) sets out the Investment Priorities for the period 1 April 2021 to 31 March 2024 across six areas. In each, a number of priority project / programme areas have been identified that are the focus for intervention.
- 3.2 Investment Priority 5 will deliver a range of programmes and schemes which focus on:
- Creating an affordable, simple, integrated, and accessible system for people to travel anywhere by public transport.

- Increasing passenger numbers on bus, rail, and future transport networks.
- Improving air quality and reduction in car dominance.
- Ensuring that people are enabled to make sustainable travel choices from housing and employment sites.
- Transforming access for communities where households have prolonged experiences of poverty, to employment opportunities and skills centres.
- Enhancements in ticketing and travel information.
- Buses being an effective and affordable mode of transport.
- Enhancing customer satisfaction with public transport.

### **Active Travel Fund Programme Update**

#### EATF Update

- 3.3 The Emergency Active Travel Fund (EATF) has now been successfully delivered.

#### ATF2 update

- 3.4 The majority of the Active Travel Fund 2 (ATF2) programme, which was due to complete by 31 March 2022, has now been delivered, schemes still to be delivered include the Accessibility works to Huddersfield Narrow Canal, Chapeltown Active Travel Neighbourhood amendments, Armley Active Travel Neighbourhood and Spen Valley Greenway (Primrose Lane).
- 3.5 To enable efficient delivery of the remainder of the programme, there have been changes to some ATF2 schemes to reflect changing priorities, milestones, outputs, and costs. Approval of these changes are being sought and full details of these changes can be found in the main body of this report.
- 3.6 Active Travel England (ATE) have been involved in discussions around all changes to the ATF2 programme. Although ATF2 pre-dates the formation of ATE, changes to the ATF2 programme are subject to ATE's approval via their change control process.

#### ATF3 update

- 3.7 The Active Travel Fund 3 (ATF3) programme is due to complete by 31 March 2024, and many schemes within the programme have been delivered. There have been several changes to schemes within the ATF3 programme to reflect changing priorities and cost increases. This includes schemes that are forecast to go beyond the March 2024 completion deadline. Approval of these changes are being sought and full details of these changes can be found in the main body of this report.

- 3.8 ATE have been involved in discussions around all changes to the ATF3 programme. Changes to the ATF3 programme are subject to ATE approval via their change control process.

ATF4 update

- 3.9 The Active Travel Fund 4 (ATF4) programme continues in development, with schemes working up Business Justification Cases or Full Business Cases for approval.
- 3.10 To date three schemes have had Approval to Proceed submissions approved and are now in delivery, though all are not currently on site. These schemes are West Yorkshire School Streets, Eastern Gateway and the Bentleys Residential Area
- 3.11 The Holbeck Connector scheme has also received approval of a Business Justification Case and is now in delivery, though work on site has not yet commenced.
- 3.12 Districts continue to engage with the Combined Authority Programme and Strategic Portfolio Office teams to develop business cases.
- 3.13 ATF4 schemes will all progress through the Combined Authority's Quality Panel, and districts are engaging the Combined Authority's Programme team to ensure designs meet the required standards from the Combined Authority and ATE.

## Scheme summaries

<p><b>BCPC Kings Road Sustainable Transport Corridor</b> Bradford</p>	<p><u>Scheme Description</u></p> <p>The Kings Road corridor is a key traffic route into Bradford City Centre. The scheme will introduce additional bus priority, a new cycle lane, improved bus stop facilities and pedestrian provision, and the reduction to some speed limits.</p> <p>The scheme is to be delivered through the City Region Sustainable Transport Settlement (CRSTS) fund.</p> <p><u>Impact</u></p> <p>The interventions will encourage local trips to be made by bus, walking, or cycling and reducing the speed limit will improve safety and reduce risk of casualties.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 1.01. This is categorised as low value for money. A more detailed appraisal of benefits, including mode shift and social and environmental impacts, will be carried out at the next decision point which should improve the BCR.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 (SOC) and work commenced on activity 3 (OBC).</p> <p>Total value of the scheme - £34,999,161</p> <p>Total value of Combined Authority funding - £34,999,161</p> <p>Funding recommendation sought - £3,540,990</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Bus Highway Hotspot Improvements Programme (BHHIP)</b> Bradford, Leeds, and Wakefield</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme will deliver bus priority improvements at ten key locations on the highway network in Bradford, Leeds and Wakefield, to improve journey time reliability for bus users and reduce congestion for other modes.</p> <p>The scheme is to be delivered primarily through the Levelling Up Fund 2 programme with some funding also from City Regional Sustainable Transport Settlement (CRSTS) fund.</p> <p><b><u>Impact</u></b></p> <p>The programme is designed to help remove barriers to bus travel in West Yorkshire, improving connectivity and accessibility to opportunities to jobs, education and training, particularly for those living in low-income communities with limited access to cars. This will help deliver inclusive growth and encourage modal shift towards public transport to contribute to the decarbonisation of the transport network.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 0.6:1. This is categorised as poor value for money. This is predominantly due to a single scheme of strategic significance. The BCR without this scheme is 2.7:1, representing 'high' value for money.</p> <p><b><u>Decision sought</u></b></p> <p>The Bus Highway Hotspot Improvement Programme proceeds through decision point 2 (strategic outline case) and work commences on development of the relevant business cases for each individual scheme.</p> <p>Total value of the scheme - £2,083,359</p> <p>Total value of Combined Authority funding - £2,083,359</p> <p>Funding recommendation sought - £1,743,359</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Huddersfield Rail Station Connections</b></p> <p>Kirklees</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme will deliver improvements to the walking, cycling and public transport infrastructure in Huddersfield Town Centre, to make it easier and safer for pedestrians, cyclists and public transport users to access the rail station and the rest of the town centre.</p> <p>The scheme is to be delivered through the Transforming Cities Fund.</p> <p><b><u>Impact</u></b></p> <p>The scheme aims to deliver measurable improvements to journeys by public transport, walking and cycling into the rail station and the town centre.</p> <p>It will improve the safety pedestrians and cyclists in the town centre and help to better connect low-income households in Huddersfield with employment, training and educational opportunities across the region,</p> <p>The scheme has a benefit cost ratio of 1.44. This is low value for money. The scheme will provide benefits for pedestrians, cyclists, and bus users, with the disbenefits to motorists. Should highway disbenefits be discounted, the BCR could potentially increase above 1.8, which would represent medium value for money.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 3 (Outline business case) and work commences on activity 4 (Full business case).</p> <p>Total value of the scheme - £18,702,478</p> <p>Total value of Combined Authority funding - £15,702,478</p> <p>Funding recommendation sought - £924,323</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>TCF Dewsbury – Batley – Chidswell Sustainable Travel Corridor</b></p> <p>Kirklees</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme is to provide new and upgraded cycle provision, pedestrian route improvements, junction upgrades and crossing facilities, primarily along the A652 corridor route linking Dewsbury to Batley Rail Station and onwards to Chidswell.</p> <p>The scheme is to be delivered through the Transforming Cities Fund.</p> <p><b><u>Impact</u></b></p> <p>The improved walking and cycling travel routes along the Dewsbury, Batley and Chidswell A652 corridor will encourage the uptake of trips to key employment, education, and housing sites by foot or bike, reducing car dependency, and contribute to reducing carbon emissions and improving local air quality, which will help improve people's health and wellbeing.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 0.5:1. This is categorised as poor value for money. The scheme was calculated to have relatively high benefits for pedestrians and cyclists however, the BCR result is due to the costs for the scheme and some disbenefits to highway users. The BCR potentially represents a worst-case scenario and other benefits of the scheme, such as cumulative impacts and wider economic benefits, have not been quantified.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 3 (outline business case) and work commences on activity 4 (full business case).</p> <p>Total value of the scheme - £9,992,299</p> <p>Total value of Combined Authority funding - £9,992,299</p> <p>Funding recommendation sought - £926,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>TCF Harrogate Railway Station Gateway - Active Travel Improvement</b> Harrogate</p>	<p><b>Scheme description</b></p> <p>The scheme will deliver walking, cycling, and bus improvements in Harrogate town centre, principally along Station Parade up to the Station Bridge junction, adjacent to the Harrogate bus and rail stations.</p> <p>The scheme is to be delivered through the Transforming Cities fund (TCF).</p> <p><b>Impact</b></p> <p>The scheme will encourage more people to make local trips by walking, cycling, or the bus, instead of the car, easing congestion on the local highway network in Harrogate and contribute to reducing carbon emissions and improving local air quality.</p> <p>Delivery of public realm improvements such as new paving at Station Square will improve the sense of place and arrival into Harrogate.</p> <p>The value for money assessment benefit cost ratio (BCR) is 0.8:1. This is categorised as poor value for money. The poor BCR is largely because of increase in scheme costs combined with a reduced scope, with the scheme to mainly disbenefit highway users, noting the limitations of the traffic modelling to assess all impacts, and modest walking, cycling, and bus benefits are retained, in line with the funding objectives.</p> <p><b>Decision sought</b></p> <p>Approval to proceed through decision point 4 (full business case) to activity 5 (delivery) subject to conditions.</p> <p>Total value of the scheme - £12,056,970</p> <p>Total value of Combined Authority funding - £11,006,970</p> <p>Funding recommendation sought - £11,006,970</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>TCF Skipton Railway Station Gateway - Active Travel Improvement</b></p> <p>Skipton</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme aims to enhance the Skipton Railway Station forecourt and improve walking routes between the railway station, the bus station and Skipton town centre through the provision of improvements to the pedestrian facilities. The proposed interventions will transform Skipton Railway Station to a sustainable travel hub improving the connections between Skipton and the wider region, supporting inclusive and sustainable economic growth.</p> <p>The Transforming Cities Fund will be utilised to fund phase 1 of this scheme, North Yorkshire Council are investigating potential funding sources for phase 2.</p> <p>The scheme is to be delivered through the Transforming Cities Fund.</p> <p><b><u>Impact</u></b></p> <p>The scheme is expected to encourage more trips to be made by bus, rail and on foot, supporting clean growth through the reduction in car trips and car kilometres on the Skipton Road network, contributing to reduced greenhouse gas emissions and improved air quality.</p> <p>The scheme is anticipated to have wider social benefits, promoting inclusive growth by improving accessibility to Skipton railway and bus stations and consequently to employment and educational opportunities across the wider region.</p> <p>The scheme's value for money assessment for Phase 1 reflects a benefit cost ratio (BCR) of 4.25:1 which represents 'very high' value for money. The benefit cost ratio (BCR) for both phases of the scheme is 3.03:1 which represents 'high' value for money.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £7,171,771 (Phase 1) / £15,070,000 (Phase 1 &amp; 2)</p> <p>Total value of Combined Authority funding - £6,971,771 (Phase 1)</p> <p>Funding recommendation sought - £6,971,771 (Phase 1)</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>TCF Selby Station Gateway</b></p> <p>Selby</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme includes transformative measures focussed on Selby Rail Station and its surrounding area. It comprises Selby Station Gateway, Ousegate Active Travel Corridor, and Eastern Station Access.</p> <p>It includes a light touch refurbishment of the exterior of the station entrance as well as improvements to pedestrian and cycle accessibility.</p> <p>The scheme is to be delivered through the Transforming Cities Fund (TCF).</p> <p><b><u>Impact</u></b></p> <p>The external refurbishment of the station and the accessibility improvements in the adjacent area are expected to increase footfall in the Station Gateway area and improve passenger satisfaction levels with the rail station. Accessibility improvements will be particularly beneficial for those with mobility impairments.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 0.31:1. This is categorised as poor value for money. The Poor VfM rating is largely as a result of highway user disbenefits, such as increased journey times. When the highway impacts are removed, the value for money category is High.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £25,375,508</p> <p>Total value of Combined Authority funding - £20,289,375</p> <p>Funding recommendation sought - £14,376,375</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Kirklees Speed Limit Review</b></p> <p>Kirklees District</p>	<p><b><u>Scheme description</u></b></p> <p>This scheme will improve road safety and develop improved facilities for walking and cycling school related trips within Kirklees. This will be delivered through a package of interventions which will include the review of existing 20mph speed limit zones, the production of school travel action plans as well as the replacement of missing or damaged speed limit signs and lines.</p> <p>The scheme is to be delivered through the City Regional Sustainable Transport Settlement fund.</p> <p><b><u>Impact</u></b></p> <p>The scheme will improve speed limit compliance to improve road safety and will increase the number of children that are able to walk or cycle to school through the development and implementation of active travel action plans for targeted schools. The reduction of the number of journeys to and from school taken by car supports the reduction of carbon emissions and improved active travel connectivity to education sites.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) of 1.2:1. This demonstrates that the scheme would have a net positive effect but is categorised as low value for money. The calculation, however, was only based on the speed reduction element of the scheme, due to its stage of development, and other potential road safety benefits could materialise.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £1,052,000</p> <p>Total value of Combined Authority funding - £900,000</p> <p>Funding recommendation sought - £875,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>A58/A672 Corridor Improvement</b></p> <p>Calderdale</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme is currently delivering a package of transport interventions to improve highway efficiency for the benefit of all road users along part of the West Yorkshire Key Route Network (WYKRN), comprising the A58/A672 between Halifax and the M62 Junction 22 via Sowerby Bridge, Ripponden, and Rishworth.</p> <p>A change request is required to increase the Combined Authority contribution, revise the scheme scope, and extend the delivery timescale, so that work can continue and be completed on site.</p> <p>The scheme will be funded by the West Yorkshire-plus Transport Fund (WY+TF).</p> <p><b><u>Impact</u></b></p> <p>The scheme will reduce journey times for all users along the corridor, supporting an improvement in journey reliability and reducing the levels of congestion, which will also improve the local air quality. Delivery of sustainable travel improvements will benefit bus users, pedestrians, and cyclists who wish to make local trips by bus, foot, or bike. The package of measures will also collectively improve road safety for all users.</p> <p><b><u>Decision sought</u></b></p> <p>Approval of the change request to increase the Combined Authority contribution, revise the scheme scope, and extend the delivery timescale, and work continues on activity 5 (delivery).</p> <p>Total value of the scheme - £6,775,769</p> <p>Total value of Combined Authority funding - £6,775,769</p> <p>Funding recommendation sought - £1,333,769</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Zero Emission Bus Regional Area (ZEBRA)</b> West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The Combined Authority's Zero Emission Bus Regional Area (ZEBRA) (Phase 1) scheme is delivering 136 new zero emission buses (ZEBs) and supporting infrastructure into the West Yorkshire bus fleet. These new buses will be 'best of fleet' and are being introduced along agreed routes in Leeds, Wakefield and Bradford to communities with some of the highest levels of air pollution in the City Region.</p> <p>This project is the first of three phases within the Zero Emission Bus (ZEB) programme.</p> <p>This change request seeks approval to a change of project scope and redistribution funding between two of the three bus operators that the combined Authority is working with to introduce the new buses, and to extend the overall delivery timescales.</p> <p>In addition, advance approval of DfT ZEBRA 2 funding is sought, so that orders for new zero emission buses can be placed immediately, if an award is made.</p> <p>This project is funded from the Zero Emission Bus Regional Area (ZEBRA) Fund.</p> <p><b><u>Impact</u></b></p> <p>The scope change will increase the number of ZEB's being delivered from 136 to 141, widening the decarbonisation and air quality benefits of the scheme. If awarded, the additional ZEBRA 2 funding will increase this to 183 ZEBs.</p> <p>The benefit cost ratio BCR for the ZEBRA scheme is 1.5:1 to 2:1 representing medium values for money (VfM). If awarded, the ZEBRA 2 funded elements have a BCR of 2.05:1 representing high value for money VfM.</p> <p><b><u>Decision sought</u></b></p> <p>The change request to change the scope to redistribute funds between providers, and to accept funding for ZEBRA 2 funding, if awarded, is approved and work continues activity 5 (delivery).</p> <p>Total value of Combined Authority funding – up to £36,505,365 Total Value of CA funding - up to £36,505,365 Funding recommendation sought – up to £6,196,125</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Active Travel Fund and Capability Fund Programme – Active Travel Fund 4 Extension and Capability Fund Extension</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The Active Travel Fund (ATF) programme delivers improved and safe walking, wheeling, and cycling infrastructure across West Yorkshire. The Capability Fund programme provides behaviour change interventions across West Yorkshire at both a district and region-led level to encourage and enable cycling, wheeling and walking and also assists in developing a pipeline of schemes for future active travel funded works by carrying out appropriate feasibility studies.</p> <p>The Active Travel Fund 4 Extension (ATF4E) and Capability Fund Extension schemes will build on the Emergency Active Travel Fund (EATF), Active Travel Fund Tranches 2, 3 &amp; 4 and the Capability Fund.</p> <p>The ATF4E will be funded through the Active Travel England (ATE) ATF4E funding award and the Capability Fund Extension will be funded through the Active Travel England Capability Funding Extension award.</p> <p><b><u>Impact</u></b></p> <p>Delivery of these active travel infrastructure enhancement schemes will make it easier for more people to travel to work, education, and training more sustainably and by more affordable means when compared to private car ownership.</p> <p>The Capability Fund programme will support in developing Policy initiatives and the development of feasibility for a pipeline of schemes ready to respond to future funding calls. The Capability Fund will also contribute and expand the Combined Authority's and district Partners existing behaviour change programme to encourage and enable wider use of cycling, wheeling and walking.</p> <p>For ATF4 schemes the Benefit Cost Ratio's (BCR) ranges from 1.61 to 9.52, classifying schemes as Medium to very high value for money (VfM). Further appraisal will be carried out through the respective project business cases.</p> <p><b><u>Decision sought</u></b></p> <p>Approval of the change request to accept new funding into and expand the scope of the Active Travel Programme Tranche 4 and change funding allocations and timescales within Tranches 2 and 3.</p> <p>Total value of the scheme - £24,309,438</p> <p>Total value of Combined Authority funding - £24,309,438</p> <p>Funding recommendation sought - £3,082,319</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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3.14 Since the Combined Authority’s meeting on 01 February 2024, no decision points or change requests have been assessed in line with the Combined Authority’s assurance process and approved through the agreed delegation to the Transport Committee.

**Transport schemes delegation of approval of schemes to Transport Committee or Chief Executive due to gap in Committee.**

3.15 A number of complex transport schemes are currently delivering at pace. There is a gap in Committees after this Committee and therefore a delay in opportunities for schemes to be approved, affecting delivery timescales. The next Combined Authority is not until 20 June 2024 and further ones have not yet been diarised.

3.16 To maintain programme delivery and spend targets a delegation is sought from the Combined Authority to the Transport Committee, taking place 24 May 2024, for the following schemes plus any others identified following this meeting:

<p><b>Leeds City Bus Station Roof</b> Leeds</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme will seek to replace all of the existing roof at Leeds Bus Station and the supporting sub-structure and existing Real Time Information (RTI), CCTV, Fire Alarms and all associated services and utility infrastructure currently attached to the roof.</p> <p><b><u>Impact</u></b></p> <p>The scheme will look to:</p> <ul style="list-style-type: none"> <li>• Reduce the whole of life carbon for the site by introducing multiple solar panels, green roofing, rainwater harvesting, and improved building heating and cooling.</li> <li>• Create a bio-diversity net gain by incorporating wild-flowering as part of the green roof installation.</li> <li>• Prioritise West Yorkshire sub-contractors and supporting apprenticeships and green jobs.</li> </ul>
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<p><b>Horsefair</b> Wakefield</p>	<p><b><u>Scheme description</u></b></p> <p>The Horsefair Gateway, an accelerated Sub-Package of the TCF A639 Leeds to Pontefract Corridor, aims to transform the historic gateway of Pontefract Town Centre, by enhancing the urban realm of Horsefair and the adjoining areas of Northgate, Finkle Street, Broad Lane, Micklegate, and Castle Garth. Its primary focus is to create a pedestrian-friendly environment that strengthens the link between Pontefract’s historic Town Centre and its Castle, elevating the visitor experience and promoting a cleaner, eco-friendly high street.</p> <p><b><u>Impact</u></b></p> <p>It seeks to enhance safety and accessibility for pedestrians and cyclists, encouraging the use of sustainable transport by making the area less car dominated through rationalising vehicle movements and reducing car parking availability.</p>
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3.17 The Combined Authority approves that:

- (i) Where scheme approval is required before 20 June 2024, the schemes outlined in paragraph 3.16 are delegated for approval to the Transport Committee, due to expediency of delivery.

#### 4 Information

4.1 The Combined Authority’s assurance framework requires that formal approval is given to the following elements of a scheme as part of its development:

- The progression of a scheme through a decision point to the next activity.
- Indicative or full approval to the total value of the scheme funding requested.
- The Combined Authority’s entry into a funding agreement with the scheme’s promoter.
- The assurance pathway and approval route for future decision points.
- The scheme’s approval tolerances.

4.2 This report provides information required to enable the Combined Authority to approve each of the above elements.

#### Projects in Stage 1: Assessment and Sequencing

4.3 There are no schemes to review at this stage.

#### Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>BCPC Kings Road Sustainable Transport Corridor</b>
<b>Stage</b>	1 (assessment and sequencing)
<b>Decision Point</b>	2 (strategic outline case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.4 The King Road Sustainable Transport Corridor scheme will be funded from City Region Sustainable Transport Settlements (CRSTS) Fund. The £830,000,000 CRSTS fund was awarded to the Combined Authority on 1 April 2022 and was made possible due to the devolution arrangements upon becoming a Mayoral Combined Authority in May 2021. CRSTS aims to deliver schemes to tackle congestion, improve air quality and make sustainable transport (public transport, walking and cycling) the first choice of transport for people in West Yorkshire. It will enable the transport network to adapt to meet the needs of the expanding population of West Yorkshire and the pressure this creates on the transport network so that public transport become an attractive and truly viable alternative to the car.
- 4.5 The King Road corridor is a key traffic route into Bradford City Centre. This corridor currently experiences high levels of congestion which impacts bus service journey times and reliability. The current bus stop facilities have been identified as needing improvement as have the footpaths, pedestrian crossing points, and infrastructure for cyclists. The exist challenges have created accessibility and safety issues. This has made walking, cycling, and use of public transport on this corridor an unattractive choice of travel.
- 4.6 To address the challenges, the scheme has developed a package of measures which include:
- New bus lanes and bus priority at junctions.
  - Improvements to bus stop waiting facilities such as shelters, seating, real time information and route finding.
  - New cycle lanes.
  - Improvements to pavements and new crossing points.
  - Reducing speed limits to provide a consistent speed limit along the corridor and implementing corridor wide parking management measures.
- 4.7 The scheme objectives include:
- Improve the overall bus user experience.
  - Create a safe & accessible corridor for all.
  - Improve active travel connectivity and quality of place.
  - Mitigate carbon and reduce emissions.
  - Align with and support planned growth and investment.
- 4.8 The scheme will help deliver objectives of the CRSTS programme, as well as the West Yorkshire Mayoral pledge of “tackling the climate emergency and protecting the environment” and priorities of the Strategic Economic Framework including “Enabling Inclusive Growth”.
- 4.9 A summary of the scheme’s business case and location map is included in **Appendix 1**.

## **Outputs and Outcomes**

4.10 The scheme outputs are:

- 4.3km of new bus lanes.
- 5.2km of new segregated cycle lanes.
- 10 new walking and cycling crossing points.
- 1 bus priority signal.
- 21 bus stops upgraded, including new shelters, seating, and routing information.
- 5 modal filters (access only).
- 1 CYCLOPS / Dutch style signalised cycling junction enhancement.
- 1 upgraded underpass (Botany Avenue, to allow cycle movements without barriers).
- 1,700sqm of new public, green space.
- 7,367sqm of public realm improvements including pavement upgrades.

4.11 The scheme outcomes are:

- Increase bus users along the corridor by 2030.
- Increase cycle trips along the corridor by 2030.
- Increase walking trips along the corridor by 2030.
- Reduce bus journey times in peak hours and improve bus journey reliability by 2030.
- Reduce traffic flow in peak hours by 2030.
- Reduce carbon emissions along the corridor by 2030.
- Improve the air quality along the corridor by reducing NO2 concentrations by 2030.
- Improve safety with zero pedestrian casualties by 2030.
- Improve quality of street environment using the Healthy Streets design check.
- Improve perception of the corridor by bus users, cyclists, and pedestrians when compared to the pre-scheme survey.

4.12 The value for money assessment indicates a Benefit Cost Ratio (BCR) of 1.01, categorising the scheme as low value for money. A more detailed appraisal of benefits, including mode shift and social and environmental impacts, will be carried out at the next decision point which should improve the BCR.

## **Tackling the Climate Emergency Implications**

4.13 The scheme tackling climate emergency implications are:

- Improved walking, cycling, and bus infrastructure will encourage commuters to make local trips by foot, bike, or bus instead of the car, reducing traffic congestion and car distance travelled and subsequently reduce carbon emissions and improve local air quality.
- With more people cycling to work or accessing retail and education sites, this will encourage those organisations to act and improve cycle facilities at their site.
- The scheme will integrate green infrastructure into the design (e.g., new trees and planting) and support the natural ecosystem to achieve a minimum biodiversity net gain of 10%.

4.14 A stage 1 Carbon Impact Assessment has been carried out indicating support to reducing greenhouse gas emissions and encouraging modal shift to walking, cycling, and public transport. Stage 2 Carbon Impact Assessment is to be carried out at outline business case stage.

### **Inclusive Growth Implications**

4.15 The scheme inclusive growth implications are:

- The scheme will better connect low-income residential areas in northeast Bradford who typically have low car ownership with the economic opportunities and investment that is occurring in Bradford city centre and surrounding areas. This will enhance access to employment, education, training, retail, and housing sites by bus, walking, and bike.

### **Equality and Diversity Implications**

4.16 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case.

4.17 The scheme will improve accessibility and perceptions of safety along the corridor for all users, including protected groups, by improving bus stop facilities, providing step free widened footpaths with dropped kerbs and raised crossings, and enhanced lighting.

### **Consultation and Engagement**

4.18 Engagement has been carried out with a number of stakeholders, such as local schools, bus operators, mobility planning groups, local councillors and Ward members, and local businesses, through a mix of in person and virtual meetings, as well as email communications. Feedback received has helped develop the scheme with a full public consultation exercise to be carried out ahead of the OBC submission.

### **Risks**

4.19 The key scheme risks and mitigations are:

- Utility diversions results in significant diversion costs and impact to the programme. This will be mitigated by securing relevant utility surveys and

carrying all relevant ground investigations to give confidence to the scheme design at outline business case.

- That sections of the scheme do not comply with the Department for Transport Local Transport Note 1/20 Design Standards (LTN1/20), impacting deliverability. This will be mitigated by holding early engagement with the Combined Authority's Quality Panel and Active Travel England, with feedback to be incorporated into the scheme design.
- That the scheme fails to gain or maintain political support, impacting deliverability. This will be mitigated by ensuring the Portfolio Holder, Ward Members, and internal team at Bradford Council are kept informed of all business case development updates.
- That the available budget is exceeded because of inflation cost impacts, impacting affordability and deliverability of the preferred scheme. This will be mitigated by holding regular cost reviews with the construction contractor and design partner procured on a design and build contract.

### Costs

- 4.20 The total forecast scheme cost is £34,999,161.
- 4.21 The scheme will be fully funded from the Combined Authority's CRSTS programme.
- 4.22 At decision point 1 (strategic assessment) up to £250,000 of development costs were approved to develop the strategic outline case (SOC).
- 4.23 At decision point 2 (SOC), additional approval of £3,540,990 is sought to progress the scheme to decision point 3 (OBC), taking the total approval to £3,790,990.
- 4.24 The Combined Authority will need to enter into an addendum to the existing funding agreement with Bradford Council for expenditure of up to £3,790,900 from the CRSTS Fund.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
3 (outline business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Transport Committee	25/04/2025
4 (full business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Executive (CE)	26/11/2025
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team	28/04/2027



	Decision Combined Authority's Director of Transport, Policy and Delivery (DoTPD):	
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### Other Key Timescales

- Construction is forecast to commence in February 2026.
- Construction is forecast to complete in March 2027.

### Assurance Tolerances

- 4.25 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +10% of those outlined in this report.
Completion/service delivery date remains within +6 months of those outlined in this report.
Outputs remain within -10% of those outlined in this report.

### Appraisal Summary

- 4.26 The SOC provides detail on the strategic drivers including support to CRSTS funding objectives; and sets out engagement carried out with key stakeholders to support development of the scheme.
- 4.27 The business case also sets out the design and build route to procure construction works with a contractor and design partner in place.
- 4.28 Scheme costs have been suitably presented, including allowance for risk and inflation impacts. There will be greater confidence in the cost once appropriate surveys are carried out at outline business case.
- 4.29 The economic case presents sufficient detail on the optioneering process, and the forecast scheme benefits, with early indication that the scheme will deliver good active mode (walking, cycling) and bus benefits in line with the intended objectives of the CRSTS programme.
- 4.30 An indicative delivery programme is presented as well as an early understanding of scheme risks. Bradford Council will lead on the development and delivery of the scheme and have experience in delivering highways schemes of this nature. It appears the scheme is deliverable under Permitted Development Rights with no requirement to purchase 3<sup>rd</sup> party land. New and amended Traffic Regulation Orders will be required and will be better understood at OBC stage.

### Recommendations

- 4.31 The Combined Authority approves that:

- (i) The BCPC Kings Road Sustainable Transport Corridor scheme proceeds through strategic outline case (decision point 2) and work commences on outline business case (decision point 3).
- (ii) An indicative approval to the Combined Authority contribution of £34,999,161 is given. The total scheme value is £34,999,161.
- (iii) Development costs of £3,540,990 are approved in order to progress the scheme to outline business case (decision point 3) taking the total scheme approval to £3,790,990.
- (iv) The Combined Authority enters into an addendum to the existing funding agreement with Bradford Metropolitan District Council for expenditure of up to £3,790,990.
- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>Bus Highway Hotspot Improvements Programme (BHHIP)</b>
<b>Stage</b>	1 (assessment and sequencing)
<b>Decision Point</b>	2 (strategic outline case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.32 The scheme will be primarily funded by the Department for Transport's (DfT) Levelling Up Fund 2 (LUF2) programme.
- 4.33 Levelling up is at the heart of the government's agenda to build back better after the pandemic and to deliver for citizens in every part of the UK. The second round (LUF2) focuses on three investment themes:
- Transport investment - including (but not limited to) public transport, active travel, bridge repairs, bus priority, local road improvements, major structural maintenance, and accessibility improvements.

- Regeneration and town centre investment - building on the Towns Fund framework to upgrade eyesore buildings and dated infrastructure; acquire and regenerate brownfield sites; invest in secure community infrastructure and crime reduction; and bring public services and safe, accessible community spaces into town and city centres.
  - Cultural investment – maintaining, regenerating, or creatively repurposing existing cultural, creative, heritage and sporting assets, or creating new assets that serve those purposes including theatres, museums, galleries, production facilities, libraries, visitor attractions, and sports and athletics facilities.
- 4.34 The LUF2 programme was expected to run to March 2025 but following delay to the award timescales, the DfT has given allowance for scheme completion to March 2026.
- 4.35 A key issue for buses and their passengers throughout the region is bottlenecks which cause a disproportionate amount of delay and reduce bus reliability. The Bus Highways Hotspot Improvement Programme looks to tackle this issue through the ten scheme which make up this Bus Highways Hotspot Improvement Programme. The locations were identified by working with bus operators as part of the LUF2 bid, the bus operators noted these locations as being particularly problematic to bus services.
- 4.36 The schemes which were successful and included in The Bus Highways Hotspot Improvement Programme were:
- A647 Leeds Road/Garnett Street, City Centre, Bradford Council
  - Bolton Road/Leeds Road/Stone Hall Road, Eccleshill, Bradford Council
  - Little Horton Lane/Park Lane, City Centre, Bradford Council
  - Leeds Road/Laisterdyke, Laisterdyke, Bradford Council
  - Selby Road/Chapel Street, Halton, Leeds City Council
  - High Royd Signals, Guiseley, Leeds City Council
  - A61 John Smeaton Flyover/South Accommodation Road, Leeds City Council
  - Hemsworth Town Centre (Bus Station Approach and Market Street), Wakefield Council
  - Castleford Town Centre (Carlton Street/Albion Street), Wakefield Council
  - Minor Responsive Works Fund, Wakefield Council
- 4.37 The scheme objectives are:
- Deliver bus journey time savings of 10% by March 2027 through a package of bus priority measures at key congestion hotspots.
  - Improve bus journey time reliability by 10% by March 2027 at the locations where bus hotspot improvements are being installed.

- To improve accessibility of bus services through minor bus stop enhancements at several locations in Wakefield by March 2026.

4.38 A summary of the scheme's business case is included in **Appendix 2**

### **Outputs and Outcomes**

4.39 The scheme outputs include:

- Modification of bus lane and existing pedestrian crossing to give bus services priority over traffic in the right-hand lane. Bus stop to be relocated approximately 90 metres east of its current position (A647 Leeds Road / Garnett Street).
- Section of new inbound bus lane on Bolton Road facilitated with a bus gate to accelerate buses ahead of other traffic. Banning the right turn from Bolton Road (westbound) into Bolton Drive. Removal of one of the two bus stops in close proximity inbound on Bolton Road (Bolton Road/Leeds Road/Stone Hall Road).
- Removal of a mini roundabout and replacement with a signalised junction. Prohibition of a right-turn into Park Lane from Little Horton Lane inbound (Little Horton Lane/Park Lane).
- Traffic Signal Upgrade - Provision of a right turn filter light for traffic turning from Leeds Road (inbound) into the A6177 and parking amendments (Leeds Road/Laisterdyke).
- Traffic Signal Upgrade improvements to signal timing and improvements to bus stopping facilities (Selby Road/Chapel Street, Halton).
- Traffic signal upgrade (High Royds Signals, Guiseley).
- Banned traffic movements through a Traffic Regulation Order and a new bus lane (A61 John Smeaton Flyover / South Accommodation Road).
- Road space reallocation & traffic signal bus priority (Hemsworth town centre).
- Enforcement of traffic restrictions - Castleford Town Centre (Carlton Street/Albion Street Junction).
- Bus stop enhancements including hard stand surfacing and kerbing works.

4.40 The scheme outcomes are:

- Deliver bus journey time savings of 10% by March 2027 at the hotspot locations.
- Improve bus journey time reliability by 10% by March 2027 at the hotspot locations.
- Improved bus experience, safer perceptions of bus travel, enhanced confidence in accessing buses.
- Improved access to jobs and training opportunities.

- Increased uptake of public transport through a more competitive alternative to the private car.
  - Reduction in carbon emissions through modal shift away from private car use.
- 4.41 The benefit cost ratio for the combined programme of schemes is 0.6:1, which is classified as poor value for money. This is significantly impacted by the estimated highway disbenefits predicted for one scheme - the A61 John Smeaton Flyover/ South Accommodation Road junction proposal.
- 4.42 When the full impact of all schemes, except the A61 John Smeaton Flyover/ South Accommodation Road junction scheme, are considered, the BCR is 2.7:1, representing high value for money. If the benefits solely related to bus users are considered in isolation, without disbenefits to all highway users, the BCR is calculated as 3.6:1, representing 'high' value for money.
- 4.43 The A61 John Smeaton Flyover/South Accommodation Road scheme is of small value but is a strategically significant scheme for Leeds City Council. Its implementation will support the maximisation of benefits from the recently delivered LPTIP scheme that introduced a bus lane along the A639. This will benefit all bus services that use the corridor including Stourton park and ride, with particularly significant benefit to services that use South Accommodation Road.
- 4.44 The scheme will bring disbenefits for general traffic that currently chooses to use National Road and Atkinson Street to access the A61 and Hunslet Road (from South Accommodation Road) into the city centre, but this route is currently utilised in a fashion it was not intended to, as it involves through traffic using local roads to bypass the strategic road network, which is designed to carry through traffic. The negative BCR is due to the impact on privately owned cars and does not fully reflect the strategic importance to the surrounding area.
- 4.45 A traffic regulation order (TRO) banning northbound motor vehicle movements on Atkinson Street to general traffic will reduce the conflict for vehicles (public transport and private vehicles) travelling through the roundabout from South Accommodation Road to the A61 on-slip. Therefore, private vehicles that travel along the strategic network (continuing along Hunslet Road and using South Accommodation Road) will benefit from the new TRO.

### **Tackling the Climate Emergency Implications**

- 4.46 The tackling climate emergency implications are:
- Improved journey times and reliability of bus services, which can encourage people to travel by bus rather than private car to help reduce carbon emissions and improve air quality.
- 4.47 A Stage 1 carbon impact assessment was undertaken. This identified that the scheme is expected to be fully compatible with the Combined Authority's Net Zero future. The main benefits are expected to relate to greenhouse gas

emissions, and improvements to air quality and noise levels facilitated by a shift from private vehicle usage to bus.

### **Inclusive Growth Implications**

4.48 The scheme inclusive growth implications include:

- Encouragement of use of the bus network to reduce reliance and preference for use of the private car, by those living near to routes that pass through the hotspot areas. This will aid connectivity and accessibility to social, educational and employment opportunities particularly for those that do not have access to a car or do not wish to use a car.

### **Equality and Diversity Implications**

4.49 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

4.50 The scheme's equality and diversity implications include:

- Age - potential positive impacts, particularly for children and older people who are more reliant on bus services
- Disability - positive impacts for people with disabilities who use the bus more than rail
- Sex - positive impacts for women who often cite feeling unsafe waiting at bus stops.
- Race – positive impacts as BAME communities in West Yorkshire, who are statistically less likely to have access to a personal vehicle than those who identify as white.

### **Consultation and Engagement**

4.51 Stakeholder engagement has been focused on liaison with council officers and bus operators who have provided evidence on the key challenges for bus users travelling within the locations identified for targeted improvements. The relevant members in each district have been briefed and approved the high-level programmes.

4.52 Targeted engagement with, local residents, local businesses, bus operators, politicians, and any other key stakeholders identified, is proposed at the next stage of development. District partners will lead on individual engagement exercises with the level of engagement required for each scheme relating to the type and size of the proposals.

### **Risks**

4.53 The scheme risks and mitigations are:

- The LUF2 Programme Business Case has not yet been approved by DfT putting at risk the delivery funds this will release. This is due for approval circa July 24. It is considered unlikely that DfT will reject the business case. This has been mitigated by ensuring Gainshare will be utilised as a temporary funding source and a condition has been put in place for this business case to be signed off with evidence provided by districts before schemes start delivering.
- Inflation causes scheme budgets to be exceeded/overspent – mitigation will involve annual programme level inflation reviews and regular discussion with district partners to review forecasted budgets on a quarterly basis as well as considering the options for using the ‘inflation pot’. Possibilities of descoping have been investigated and agreed throughout the development process if required.
- Schemes may not progress to delivery post-SOC - Ongoing dialogue around resource challenges between districts and the Combined Authority with escalation to CRSTS/LUF Programme Board if risk materialises.

## Costs

- 4.54 The total scheme costs are £2,083,359.
- 4.55 The Combined Authority’s contribution is £2,051,000 from the Levelling Up Fund 2 programme and £32,359 from City Region Sustainable Transport Settlements (CRSTS) fund.
- 4.56 The funding has been provisionally allocated to the 10 schemes as per the following table:

Scheme & District	Indicative Costs
<b>Bradford</b>	
A647 Leeds Road / Garnett Street	£267,542
Bolton Road / Leeds Road / Stone Hall Road	£476,146
Little Horton Lane / Park Lane	£459,558
Leeds Road / Laisterdyke	£83,758
<b>District Total</b>	<b>£1,287,004</b>
<b>Leeds</b>	
Selby Road / Chapel Street, Halton	£149,474
High Royd Signals, Guiseley	£35,537
A61 John Smeaton Flyover/ South Accommodation Road junction	£165,888

<b>District Total</b>	<b>£350,899</b>
<b>Wakefield</b>	
Hemsworth Town centre (bus station approach and Market Street)	£129,369
Castleford Town Centre (Carlton Street /Albion Street junction), Castleford	£73,518
Minor Responsive Works Fund	£154,470
<b>District Total</b>	<b>£357,357</b>
<b>Bus Highway Hotspot Improvements Programme</b>	
Programme business case development and monitoring and evaluation costs	£55,349
Programme contingency	£32,750
<b>Programme Total</b>	<b>£88,099</b>
<b>Total Overall</b>	<b>£2,083,359</b>

4.57 At decision point 1 (strategic assessment) £340,000 of development costs were approved to develop the schemes and the programme SOC with the following breakdown:

- Bus Highways Hotspots Improvement Programme for business case development £50,000
- Bradford Council for scheme development, £115,000
- Leeds City Council for scheme development, £150,000
- Wakefield Council for scheme development, £25,000

4.58 Delivery costs are now requested for all schemes in order to progress into activity 5 (delivery), subject to an approval to proceed, and development costs are £232,000 for Bradford Council and £20,000 for Wakefield Council to develop their schemes to approval to proceed.

4.59 The Combined Authority will need to enter into an addendum to existing funding agreements as listed below, permitting development costs as noted above and then all further delivery costs after approval to proceed:

- City of Bradford Metropolitan District Council: for expenditure of up to £1,287,004
- Leeds City Council: for expenditure of up to £350,899
- Wakefield Metropolitan District Council: for expenditure of up to £357,357



## Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Executive Director, Transport	31/10/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	31/03/2026

### Other Key Timescales

- Start of scheme delivery: 01/11/2024
- Scheme completion: 31/03/2026

### Assurance Tolerances

- 4.60 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

### Appraisal Summary

- 4.61 The scheme aligns, strategically, with the aims and aspirations of the Combined Authority as it seeks to improve the attractiveness of the bus network for trips to connect to employment, education and other social value opportunities. It is expected that the improvements to bus journey times and reliability will help facilitate an uptake in bus travel, and attempt to reduce trips made by cars, which can contribute to the decarbonisation of the transport sector and provide other environmental benefits. It will also further complement other bus improvement works proposed across the region through other funding programmes such as the Bus Service Improvement Plan (BSIP).
- 4.62 The business case highlights that the package of measures, when considering benefits to bus users in isolation, will provide high value for money. The overall value for money for the scheme however is considered to be poor value for money when disbenefits to all highway users is taken into account. This is because of potential delays to general traffic created by one scheme in the package, the A61 John Smeaton Flyover / South Accommodation Road scheme in Leeds. When this scheme is removed from the value for money

assessment, the remaining package elements will provide high value for money. The A61 John Smeaton Flyover / South Accommodation Road scheme is a strategically important scheme for Leeds City Council and will provide benefits to bus users while enhancing other schemes previously delivered in the vicinity.

- 4.63 Stakeholder engagement to date has been focused on liaison with council officers and bus operators who provided evidence on the key challenges for bus users travelling within the locations identified for targeted improvements. There has been no scheme specific public consultation undertaken for this scheme. However, overarching support for the “West Yorkshire Levelling Up - Bus Enhancement Package” is noted from MPs and bus operators and relevant members in each district have been briefed and approved the high-level scheme programme. Targeted engagement with, local residents, local businesses, bus operators, politicians and any other key stakeholders identified is proposed at the next stage of development.

### **Recommendations**

- 4.64 The Combined Authority approves:

(i) Development costs of £252,000 are approved in order to progress the schemes to approval to proceed, taking the total scheme approvals to £592,000:

- City of Bradford Metropolitan District Council: £232,000.
- Wakefield Council: £20,000.

(ii) The Combined Authority enters into an addendum to the existing funding agreements for expenditure as listed above.

- 4.65 The Combined Authority, approves that subject to the conditions set by the Portfolio Investment Panel that:

(i) The Bus Highway Hotspot Improvement Programme proceeds through decision point 2 (strategic outline case) and work commences on decision point 5 (delivery) of individual schemes.

(ii) Approval of £1,743,359, taking the total Combined Authority approval to £2,083,359 with indicative allocations for each scheme as below. The total scheme value is £2,083,359.

- City of Bradford Metropolitan District Council: for expenditure of up to £1,287,004.
- Leeds City Council: for expenditure of up to £350,899.
- Wakefield Metropolitan District Council: for expenditure of up to £357,357.

(v) The Combined Authority enters into addendums to the existing funding agreements for expenditure as listed above.

- (vi) That a Delegation to the Director of Transport Policy and Delivery is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (vii) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>Huddersfield Rail Station Connections</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	3 (outline business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.66 This scheme will be funded from Transforming Cities Fund (TCF), which aims to drive up productivity through improved connections between urban centres and suburbs. To do this, the TCF provides a significant opportunity to invest in infrastructure to improve public and sustainable transport connectivity in some of England's largest cities.
- 4.67 The Huddersfield Rail Station Connections scheme (HRSC) involves a series of active travel and public space improvements with the aim of making it safer and more attractive to travel to and from Huddersfield Railway Station by active modes, as well as everyday trips across Huddersfield town centre.
- 4.68 The proposed interventions are: -
- Segregated cycle track and lanes and new and improved crossing of the ring road at Trinity Street will deliver on-street improvements to increase the safety for people who cycle. Improved and additional crossings will make it safer for people who walk.
  - Changes to the junction with the ring road at St John's Road will provide new and improved crossings for people walking or cycling. A two-way

segregated cycle track would run along St John's Road north of the Ring Road junction.

- John William Street would become a tree-lined route with a 20mph speed limit north of St George's Square to the railway bridge at Fitzwilliam Street. It is intended that a cycle route would be provided along the quieter Wood Street and Brook Street, connecting to a segregated cycle lane/track towards St John's Road.
- Northumberland Street would become a tree-lined route with a new 20mph speed limit. The boulevard would include wider, high-quality pavements and improved crossing facilities (zebra crossing, raised junctions) and the existing bus stop.

4.69 The objectives of the scheme are to:

- Support increased future rail demand through improved sustainable station access.
- Enable opportunities for an increased shift from private to public and active transport.
- Improve the inclusivity and accessibility for active travel users, by increasing walking and cycling in and around the centre of Huddersfield.
- Create an enhanced people-focused Huddersfield, with elevated public spaces supporting sustainable economic growth and investment.

4.70 A summary of the scheme's business case and location map is included in **Appendix 3**.

### **Outputs and Outcomes**

4.71 The scheme outputs include:

- 3.5 kilometres of new pedestrian routes
- 0.41 kilometres of new cycle lane
- Three improved and one new and pedestrian crossing.
- Two new cycle crossings
- One bus stop upgraded and one new bus shelter

4.72 The scheme outcomes are:

- A 10% increase in rail passenger satisfaction by the end of 2030
- A 5% increase in use of station cycle parking facilities by the end of 2030
- A 10% increase in rail users accessing the station by active modes by the end of 2028
- A 5% increase in use of town centre cycle parking facilities by the end of 2028
- A 7% reduction in car mode share by the end of 2028

- A 7% Increase of walking and cycling mode share in Huddersfield by the end of 2028
- A footfall increase in town centre by 10% by the end of 2028
- A 5% increase in annual visitor numbers by 5% by the end of 2028
- A 5% reduction in pedestrians and cyclists involved in road collisions by the end of 2028

4.73 The value for money assessment indicates a core Benefit Cost Ratio (BCR) of 1.44:1 classing the scheme as low value for money when assessed against the Department for Transport's value for money criteria. The scheme will provide benefits for pedestrians, cyclists, and bus users, with the disbenefits to motorists impacting on the value for money position. Should highway disbenefits be discounted, the scheme could potentially increase the BCR above 1.8, which would represent medium value for money.

### **Tackling the Climate Emergency Implications**

- 4.74 The scheme contributes to the Mayoral Pledge of tackling the climate emergency by introducing better cycling and walking infrastructure and improved access to the railway station to encourage a shift from the car towards active and shared travel modes, including public transport.
- 4.75 The scheme supports the delivery of the West Yorkshire Climate and Environment Plan (CEP) by reducing carbon emissions from transport by providing better connections for pedestrians and cyclists to the station and access Huddersfield Town Centre.
- 4.76 A Stage 2 Carbon Impact Assessment (CIA) has been carried out to forecast the impact of the scheme over a 30-year appraisal period:
- The capital carbon emissions produced in construction are estimated to be +1,059 tonnes CO2 equivalent
  - The operational savings from a reduction in vehicle kilometres travelled as a result of mode switch (away from private car use) are estimated to be -541 tonnes CO2 equivalent.
  - The net total impact is therefore an increase in total emissions of +518 tonnes CO2 equivalent.

### **Inclusive Growth Implications**

- 4.77 Lower income households typically have low car ownership and therefore are more reliant on making local trips by bus, walking, or cycling. Accessibility to employment and educational opportunities by healthy low-cost cycling and walking is particularly important for those on low incomes who may not have access to a car.
- 4.78 By enhancing access to and improving public transport and active travel (walking, cycling) network the scheme will better connect low-income households in Huddersfield with the economic opportunities that are occurring across Huddersfield and West Yorkshire.

## **Equality and Diversity Implications**

- 4.79 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.
- 4.80 The EqIA indicates that the scheme is likely to have positive impacts for typically less represented groups and would have neutral or positive effects on all societal groups, primarily through improving safety and mitigating the negative impacts of car dominated environments.
- 4.81 The scheme helps improve perceptions of the safety of cycling, as the scheme allows for cycling segregated from traffic, addressing one of the key reasons people don't cycle. Provision for disabled parking will also be increased as part of the scheme.

## **Consultation and Engagement**

- 4.82 Two rounds of public consultation and stakeholder engagement have taken place and details of both can be found at [Huddersfield Rail Station Connections - Second stage consultation | Your Voice \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk/your-voice).
- 4.83 Throughout the schemes development a wide range of businesses, transport providers, education, statutory organisations and special interest groups have been engaged including Huddersfield Business Improvement District (BID), TransPennine Express, Kirklees College and Kirklees Visual Impairment Network. These key stakeholders have helped inform the design.

## **Risks**

- 4.84 The scheme risks and mitigations are:
- The risk that interfacing projects (i.e. TransPennine Route Upgrade, St George's Hotel) cause programme delays or disruptions. This will be mitigated by continuing engagement with stakeholders through the project board and associated working groups.
  - The risk that inflationary pressures increase scheme costs beyond existing funding allocations and weaken the value for money position. This will be mitigated by ongoing review of costs and risk contingencies and identifying potential additional capital funding sources, including the TCF programme and Kirklees Council.
  - The risk of objections to the scheme from bus and taxi operators, disabled users and the travelling public. This will be mitigated by further consultation and stakeholder engagement and further development of relocation plans with bus operators, taxi liaison and accessibility groups during detailed design.

## **Costs**

- 4.85 The total scheme costs are £18,702,478.

- 4.86 The Combined Authority’s contribution is £15,702,478 from the Transforming Cities Fund.
- 4.87 The remaining funding of £3,000,000 is provided by Kirklees Council, the scheme promoter.
- 4.88 The total development cost allocated to date is £1,617,066. A further £924,323 is required for the development of the Full business case (FBC), taking the total approval to £2,541,389.
- 4.89 The Combined Authority will need to enter into a funding agreement with Kirklees Council for expenditure of up to £2,541,389 from the Transforming Cities Fund.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
4 (full business case)	Recommendation: Combined Authority’s Portfolio Investment Panel Decision: Internal Leadership Board	12/11/2024
5 (completion/service delivery)	Recommendation: Combined Authority’s Portfolio Investment Panel Decision Combined Authority’s Director of Transport, Policy and Delivery (DoTPD):	31/07/2026

### Other Key Timescales

- Start of delivery – 06/01/2025
- Practical completion – 31/07/2026

### Assurance Tolerances

- 4.90 The previous approvals and assurance tolerances set are outlined below:

Control area	Approval at DP2 (SOC) (CA)	Approval at DP4 (FBC) (CA)	Within tolerance?
Date	10/11/2020	14/03/2024	
Total Cost		£18,702,478	
CA Funding	The Huddersfield Town Centre ‘package’ SOC (from which this scheme derives) tolerances were +10 Combined Authority funding, + 6 months completion date and -10% outputs.	£15,702,478	Y
Completion Date (DP5)		31/07/2026	Y
Outputs / Outcomes		As per report	Y

- 4.91 The revised assurance tolerances for the recommended approval in this report are:

<b>Assurance tolerances</b>
Combined Authority funding remain within +10% of those outlined in this report.
Completion/service delivery date remains within +6 months of those outlined in this report.
Outputs remain within -10% of those outlined in this report.

### **Appraisal Summary**

- 4.92 The scheme presents a strong strategic case with a clear rationale of investment. Public consultation and stakeholder engagement is broadly supportive, and it could potentially achieve a forecast BCR of 1.44 (rising to 1.87 when highway user impacts are excluded).
- 4.93 Kirklees Council will lead the procurement process to deliver the scheme. It is anticipated that the contractor will be procured via the YORCivils framework. A construction procurement strategy will be developed by full business case.
- 4.94 Forecast costs appear robust for this stage of design with reasonable allowances for risk and contingency. TCF programme funding is available and match funding from Kirklees Council is in place. All elements of the scheme are classed as permitted development, and no third-party land is required.
- 4.95 The TCF Quality Panel Review process has been completed and was approved with advisory notes relating to outstanding issues concerning a bus stop location and signal phasing.

### **Recommendations**

- 4.96 The Combined Authority approves that:
- (i) The Huddersfield Rail Station Connections scheme proceeds through decision point 3 (outline business case) and work commences on activity 4 (full business case).
  - (ii) An indicative approval to the Combined Authority's contribution of £15,702,478 is given. The total scheme value is £18,702,478.
  - (iii) Development costs of £924,000 are approved in order to progress the scheme to decision point 4 (full business case), taking the total scheme approval to £2,541,389.
  - (iv) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £2,541,389.
  - (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.



<b>Project Title</b>	<b>TCF Dewsbury – Batley – Chidswell Sustainable Travel Corridor</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	3 (outline business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.97 This scheme will be funded from the Department for Transport’s Transforming Cities Fund (TCF). As part of the Government’s Industrial Strategy and the National Productivity Investment Fund, the TCF aims to drive up productivity through improved connections between urban centres and suburbs. To do this, the TCF provides a significant opportunity to invest in infrastructure to improve public and sustainable transport connectivity in some of England’s largest cities. This scheme will be funded through Tranche 2 of the fund, which received Department for Transport’s approval in March 2020.
- 4.98 The scheme is to provide enhanced active travel provision along the A652 corridor route linking; Dewsbury to Batley Rail Station and onwards to Chidswell. This will comprise new and upgraded cycle provision (segregated and shared use paths), pedestrian route improvements, junction upgrades to provide bus priority, new and upgraded pedestrian crossing facilities, relocation of bus stops and provision of some landscaping and benches.
- 4.99 Through provision of the enhanced active travel infrastructure, it is anticipated that the scheme will provide safer, higher-quality facilities for pedestrians and cyclists that can result in people changing how they travel from private vehicles to more sustainable modes of travel. This can help reduce congestion along the corridor, improve air quality and reduced transport-related emissions, supporting the Climate Emergency and Net Zero agenda. Provision of improved accessibility via walking and cycling can also open up access to social value opportunities (development, education, employment, training, leisure and culture) to a wider range of people, contributing to inclusive growth and equity goals.
- 4.100 The scheme will help deliver objectives of the Transforming Cities Fund programme, as well as the West Yorkshire Mayoral pledge of “tackling the

climate emergency and protecting the environment” and priorities of the Strategic Economic Framework including “Enabling Inclusive Growth”.

4.101 A summary of the scheme’s business case and location map is included in **Appendix 4**.

### **Outputs and Outcomes**

4.102 The scheme outputs include:

- 1,800 metres of new on-road segregated cycle lanes.
- 500 metres of contraflow cycle lane.
- 2 new Toucan crossing points.
- 715 metres of upgraded off-road walking routes.
- 950 metres of new shared pedestrian and cycle paths.
- 6 upgraded pedestrian crossing points.
- Junction upgrade to include a north/ south cycle-only stage on Bradford Road, and bus priority signals to improve journey reliability and reduce delay.
- Implement one-way routing on side streets on Commercial Road, Victoria Road, Rink Street and Mount Street.
- Delivery of green infrastructure including landscaping and benches.
- Improved traffic calming measures – 5 kerb to kerb plateaus and 2 rubber speed cushions.

4.103 The scheme outcomes are:

- Safer, higher-quality facilities for pedestrians and cyclists.
- Modal shift from private vehicles to sustainable modes of travel.
- 100% increase in cycling journeys along the corridor.
- Reduced congestion and vehicle dominance along the corridor.
- Improved air quality and reduced transport-related emissions, supporting the Climate Emergency Agenda.
- Improved accessibility to social value opportunities (development, education, employment, training) by sustainable modes.
- Improved cross-connectivity between local centres (Dewsbury, Batley and Chidswell).
- Improved access to Batley Rail Station for active mode users, facilitating multi-modal interchange, with an expected 5% increase in pedestrian and cyclist mode share.
- Improved network safety, particularly in relation to non-motorised users’ satisfaction, with an estimated 20% increase in pedestrian and cyclist satisfaction using the corridors.

- Improved access towards the Chidswell development site – creating a link to 120 hectares of dwellings and employment opportunities helping mitigate predicted transport growth issues.

4.104 The value for money assessment reflects a benefit cost ratio (BCR) of 0.5:1. This is categorised as poor value for money. The scheme was calculated to have relatively high benefits for pedestrians and cyclists however, the BCR result is due to the costs for the scheme. It is considered that a robust appraisal process has been undertaken, potentially representing a worst-case scenario and other benefits of the scheme, such as cumulative impacts and wider economic benefits, have not been quantified.

### **Tackling the Climate Emergency Implications**

4.105 The scheme's tackling climate emergency implications are an improved access to, and connectivity of, sustainable transport provision. This can encourage people to travel by walking and cycling rather than private car to help reduce carbon emissions.

4.106 A stage 2 (quantified) carbon impact assessment was undertaken indicating a net impact of 1,497 tCO<sub>2</sub>e over a 60 year appraisal period, comprising 1,329 tCO<sub>2</sub>e capital carbon (construction impact) and 167 tCO<sub>2</sub>e operational carbon (following scheme delivery). Whilst active travel benefits will be realised and help reduce carbon emissions, the operational carbon impact is largely because of the new pedestrian crossing points which will create more stop-start traffic movements resulting in higher fuel consumption.

### **Inclusive Growth Implications**

4.107 The scheme inclusive growth implications include:

- Improved walking and cycling connectivity to social, education, and employment sites will benefit residents of Dewsbury, Batley, and Chidswell, especially those of lower income households who do not own a car and for whom the cost of travel has been a barrier to such opportunities.
- Reduced car use for local trips will improve the local air quality and sense of place for these communities encouraging people to visit and spend more time in local centres.
- The scheme will also encourage a more physically active lifestyle, with less dependency on the car for short trips.

### **Equality and Diversity Implications**

4.108 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

4.109 The scheme's equality and diversity implications are:

- Age – The cycling design complying with Department for Transport's Local Transport Note 1/20 design standards will ensure improved safety

for users of all age groups through providing cycling infrastructure separated from the road and traffic. Wider footways, improved surfacing and improved crossing points will also benefit all age groups.

- Disability – Compliance with Department for Transport’s Local Transport Note (LTN) 1/20 design standards will ensure the cycle provision is accessible for all users, including those with any form of disability. It is noted that the scheme will be useable by bicycles adapted to specific mobility needs. The wider footways, improved surfacing and improved crossing points will also benefit those with disabilities.
- Sex – Improving safety and natural surveillance for walking and cycling will encourage more women to make local trips by foot or bike. Statistically, women are less likely to cycle than men so this should positively impact this group.

### **Consultation and Engagement**

4.110 The promoters have undertaken three rounds of public consultation details can be found on the ‘YourVoice’ pages: <https://www.yourvoice.westyorks-ca.gov.uk/dbctravel>. No further public consultation is planned.

4.111 Engagement on the scheme have taken place with key stakeholders, including Kirklees Council representatives, ward members, Network Rail, bus operators as well as the general public.

### **Risks**

4.112 The scheme risks and mitigations are:

- Risk of inflation rate increases resulting in cost increases. This will be mitigated by ensuring the use of best available inflation indexes and for a quick turnaround between tender and start of works on site. Continuous reviews of costs will also be undertaken.
- Risk of safety concerns regarding use of pedestrian crossings during construction which may result in collision/accident. This is to be mitigated by ensuring appropriate traffic management is undertaken and ensure early engagement and implementation of traffic regulation orders (TROs).

### **Costs**

4.113 The total scheme costs are £9,992,299.

4.114 The Combined Authority’s contribution is £9,992,299 from the TCF fund.

4.115 The Combined Authority TCF contribution reflects an increase of £3,992,299 from the £6,000,000 indicatively approved at decision point 2 (strategic outline case). The increase in costs is due to a better understanding of project development costs, risks, and scheme design. The additional funding is affordable to the TCF programme.

4.116 The scheme has secured approval to development costs of £849,000, and now seeks approval of a further £926,000 to progress to activity 4 (full business case), taking the total approval to £1,775,000.

4.117 The Combined Authority will need to enter into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £1,755,000 from the TCF fund.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
4 (full business case)	Recommendation: Combined Authority's Portfolio Investment Panel (PIP) Decision: Combined Authority's Executive Director, Transport	01/11/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel (PIP) Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	01/06/2026

### Other Key Timescales

- Start of delivery: 01/04/2025
- Scheme Completion by 01/06/2026

### Assurance Tolerances

4.118 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	Transforming Cities Fund Programme Change Request	TCF Programme Inflation Review	Requested approval by the CA at DP3	Within tolerance?
<b>Date</b>	04/09/20		07/02/2022	08/12/22	14/03/24	
<b>Total Cost</b>	£6,000,000		£6,000,000	£6,000,000	£9,992,299	
<b>Combined Authority Funding</b>	+10%	£6,000,000	£6,000,000	£6,000,000	£9,992,299	N
<b>Completion Date (DP5)</b>	6 months	30/09/22	01/02/24	01/01/2025	01/06/26	N
<b>Outputs &amp; Benefits</b>	-	-	-	-	-10% As per report	Y

4.119 The revised assurance tolerances for the recommended approval in this report are:

<b>Assurance tolerances</b>
Combined Authority funding remain within +10% of those outlined in this report.
Completion/service delivery date remains within +6 months of those outlined in this report.
Outputs remain within -10% of those outlined in this report.

### **Appraisal Summary**

- 4.120 The scheme aims to enhance the attractiveness of walking and cycling along the corridor, instead of using the private car. This can contribute to the decarbonisation of the transport sector and provide health benefits to the users of the scheme.
- 4.121 The improved connection to Batley rail station, for active travel modes, can enhance accessibility to the rail network and improve the ability to make longer distance journeys by sustainable transport. The scheme is therefore in accordance with a number of policies and strategies of the Combined Authority, such as the West Yorkshire Plan, Strategic Economic Framework and West Yorkshire Investment Strategy, as well as the Mayor's Pledges. The scheme can help deliver inclusive growth, promote more sustainable forms of travel and reduce carbon emissions.
- 4.122 The value for money assessment for the scheme indicated a poor value for money position. This is due to the particularly high costs for the scheme resulting from a number of changes in scope and design as well as some potential disbenefits to general road users resulting from delays due to junction upgrades to facilitate people walking and cycling. It is also considered that a robust, potentially worst-case scenario, has been presented with many benefits not being included in the calculations. The scheme is expected to provide over £3m worth of benefits for people walking and cycling including journey quality and health related benefits.

### **Recommendations**

- 4.123 The Combined Authority approves that:
- (i) The Dewsbury-Batley-Chidswell Sustainable Travel Corridor scheme proceeds through decision point 3 (outline business case) and work commences on activity 4 (full business case).
  - (ii) An indicative approval is given to the Combined Authority's contribution of £9,992,299. The total scheme value is £9,992,299.
  - (iii) Development costs of £926,000 are approved in order to progress the scheme to decision point 4 (full business case) taking the total scheme approval to £1,775,000.
  - (iv) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £1,775,000.

- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>Harrogate Railway Station gateway Active Travel Improvement Scheme</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	4 (full business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.124 The Harrogate Railway Station Gateway - Active Travel Improvement scheme will be funded through the Department for Transport's Transforming Cities Fund (TCF). As part of the Government's Industrial Strategy and the National Productivity Investment Fund, the TCF aims to drive up productivity through improved connections between urban centres and suburbs. To do this, the TCF provides a significant opportunity to invest in infrastructure to improve public and sustainable transport connectivity in some of England's largest cities. This scheme will be funded through Tranche 2 of the fund, which received Department for Transport's approval in March 2020.
- 4.125 The scheme seeks to address transport challenges such as high car dependency causing congestion on the local network, by delivering walking, cycling, and bus improvements to encourage local trips to be made by foot, bike, or bus instead of the car. This will include widened footways and new pedestrian crossing points, a new cycle lane and bus lane, a new cycle storage hub at the rail station, and improving the entrance and lighting at One Arch underpass. The scheme will also improve the paving at Station Square, making the public space more attractive.
- 4.126 The scheme will support the TCF programme objective of increasing walking, cycling, and bus trips, which will help contribute to reducing carbon emissions and improving local air quality, and support delivery of the West Yorkshire Mayoral pledge of Tackling the Climate Emergency and priorities of the Strategic Economic Framework such as Enabling Inclusive Growth.

- 4.127 The scheme scope has been revised from that presented at outline business case (decision point 3) because of inflation cost impacts and the scheme receiving a legal challenge. The East Parade and Station Bridge sections initially identified for further segregated cycle lanes have been removed, whilst the Legal challenge has impacted plans to pedestrianise James Street and to reduce Station Parade to one lane for motorists.
- 4.128 Following delays to the TCF programme nationally, beyond the March 2023 TCF programme end-date, an independent assurance review of the 12 City Regions was commissioned by the Department for Transport (DfT) and undertaken between January and March 2023. The review provided a snapshot in time of each City Region's programme affordability and achievability, with an overall delivery confidence assessment.
- 4.129 The DfT has advised the Combined Authority that the TCF term will be extended, however additional governance will be implemented to monitor delivery across the North Yorkshire schemes and additional approvals from the DfT will be required to provide funding certainty for spend in Financial Year 24/25 for these schemes. The DfT have therefore instigated a Stage Gate process, whereby additional independent reviews of the schemes Full Business Cases will be undertaken across the North Yorkshire schemes prior to award of construction contracts. The Stage Gate reviews are focused on assuring that the schemes are deliverable and that the spend profiles are realistic.
- 4.130 A summary of the scheme's business case and location map is included in **Appendix 5**.

### **Outputs and Outcomes**

4.131 The scheme outputs include:

- New bus lane
- New southbound cycle lane
- New pedestrian crossing points
- Footway widening
- Footway resurfacing and reconfiguration
- New paving
- Improved entrance and lighting at the One Arch underpass
- New cycle storage hub with lighting and CCTV

4.132 The scheme outcomes are:

- 5% increase in the number of people accessing Harrogate Station on foot
- 27% increase in the number of people accessing Harrogate Station by bike
- An average time saving for existing users
- Increase in user satisfaction using passenger surveys



- 30% footfall increase on Station Parade
- Reduction in vehicle kms travelled
- Reduction in NOx emissions
- Reduction in CO2 emissions
- Implement a minimum 3 for 1 planting regime

4.133 The value for money assessment reflects a Benefit Cost Ratio of 0.8:1 which is poor value for money. The poor BCR is largely because of increase in scheme costs combined with a reduced scope, with the scheme to mainly disbenefit highway users, noting the limitations of the traffic modelling to assess all impacts; modest walking, cycling, and bus benefits are retained, in line with the TCF funding objectives.

### **Tackling the Climate Emergency Implications**

4.134 The scheme tackling climate emergency implications are:

- By delivering a bus lane and better walking and cycling infrastructure, the scheme will encourage local trips within Harrogate to be made by bus, foot, or bike, reducing the reliance on the car, which will ease highway congestion levels, reduce carbon emissions, and improve the local air quality.

4.135 A carbon impact assessment carried out at outline business case indicated a carbon impact of +1,356 tonnes over a 60-year appraisal period, reflecting operational carbon benefits being outweighed by embodied (construction) impacts.

### **Inclusive Growth Implications**

4.136 The scheme inclusive growth implications include:

- Delivery of a new bus lane and cycle lane, as well as improved footpaths will enable people from lower income communities or those struggling against the high cost of living, to better access the town centre and key sites.

### **Equality and Diversity Implications**

4.137 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

4.138 Delivery of key accessibility features will ensure all users, including protected groups, can benefit from better and safer walking, cycling, or wheeling access to and from the town centre to key employment, education, and housing sites.

4.139 A Stage 1 Equality Impact Screening Assessment (EQIA) has been completed with a Stage 2 full EQIA to be completed.

## Consultation and Engagement

- 4.140 The scheme carried out engagement workshops with key stakeholders such as bus operators, Network Rail, Northern Rail, and the Harrogate District Cycle Action in November 2020 to seek feedback on the proposed plans. The first round of public consultation took place between February and March 2021, followed by a second round between October and November 2021, and a third round between July and August 2022. Details can be found at [Harrogate Station Gateway | Your Voice \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk/harrogate-station-gateway-your-voice).
- 4.141 The consultation has been carried out on the full scope scheme. Further public engagement is planned, including statutory consultation on new/amended Traffic Regulation Orders.

## Risks

- 4.142 The scheme risks and mitigations are:
- That the cost of utility diversions are more expensive than initial estimates, and unknown buried services are located, impacting scheme affordability and delivery of the preferred option design. This will be mitigated by continuous engagement with utility providers on the cost estimate and to secure robust design costs as part of detailed design stage, and to work with the contractor on carrying out all appropriate ground surveys including trial holes as applicable.
  - That unexpected cost increases occur because of factors such as changes in global market conditions or inflation cost impact on the supply of labour and material. This will be mitigated by continually working with the design team and contractor, such as developing a lower cost but viable solution, working with potential suppliers to determine opportunity for cost savings, and carrying out a quantified risk assessment.
  - Risk of objection from stakeholders on the final scheme design, including the public as part of consultation on TRO's. This will be mitigated by ensuring Traffic Regulation Order's requirements are considered throughout the detailed design stage, including engagement with legal teams with North Yorkshire Council.

## Costs

- 4.143 The total scheme costs are £12,056,970.
- 4.144 The Combined Authority's contribution is £11,006,970 from the Transforming Cities Fund.
- 4.145 The remaining funding is £1,050,000 from North Yorkshire Council.
- 4.146 The TCF funding of £11,006,970 to the Harrogate scheme is from the total TCF North Yorkshire Council budget of £38,269,000, which will support delivery of two other schemes, at Selby Station and Skipton Station.
- 4.147 The scheme secured approval to development costs of up to £2,096,533 following the change request of July 2023.

4.148 Should the Combined Authority retain the scheme post FBC (decision point 4) then the Combined Authority will enter into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £11,006,970.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	29/10/2025

### Other Key Timescales

- Construction is forecast to commence in September 2024.
- Construction is forecast to complete by September 2025.

### Assurance Tolerances

4.149 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 (SOC)		Approval at DP3 (OBC)	Requested Approval at DP4 (FBC)	Within tolerance?
Date	25/06/2020		08/06/2021	14/03/2024	
Total Cost	£8.443m		£10.938m	£12,056,970	
CA Funding	+10%	£7.893m	£10.638m	£11,006,970	Y
Completion Date (DP5)	6 months	31/03/23	31/03/2023	30/09/2025	N
Outputs / Outcomes	-10%	As per report	As per report	Significant scope change from OBC	N

4.150 The revised assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

## **Appraisal Summary**

- 4.151 The business case presents a reasonable summary of the proposed scheme, including detail of the revised scope because of inflation impacts and the legal challenge.
- 4.152 The revised scheme will still deliver walking, cycling, and bus improvements to support local and national sustainable travel priorities and policies, however it is accepted that the forecast benefits for pedestrians and cyclists will now be less when compared to the initial proposal.
- 4.153 Scheme costs appears affordable within the Transforming Cities Fund budget. However, there is still a risk that costs could increase because the detailed design stage is incomplete and because a Quantified Risk Assessment is still to be completed.
- 4.154 The scheme also needs to carry out a full Equality Impact Assessment to ensure the design will benefit all users, including protected groups, and carry out statutory consultation on Traffic Regulation Orders (TRO) required to implement the scheme.
- 4.155 The scheme already has a contractor in place on an Early Contractor Involvement basis, therefore once final designs are complete and a Target Cost developed that is within budget, the scheme should be able to move quickly to Delivery.

## **Recommendations**

- 4.156 The Combined Authority approves that, subject to the successful outcome of the Department for Transport's Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:
- (i) The Harrogate Rail Station Gateway Active Travel Improvement scheme proceeds through decision point 4 (full business case) to activity 5 (delivery).
  - (ii) Additional development costs of £200,000 are approved in order to progress the scheme to approval to proceed, taking the total scheme development cost approvals to £2,296,553.
  - (iii) Approval of the Combined Authority's contribution of £11,006,970 is given. The total scheme value is £12,056,970.
  - (iv) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £11,006,970, subject to confirmation from the Department for Transport that funding for FY 24/25, 25/26 and 26/27 is available.
  - (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>TCF: Skipton Railway Station Gateway – Active Travel Improvement</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	4 (full business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.157 The Skipton Railway Station Gateway - Active Travel Improvement scheme will be funded through the Department for Transport's Transforming Cities Fund (TCF). As part of the Government's Industrial Strategy and the National Productivity Investment Fund, the TCF aims to drive up productivity through improved connections between urban centres and suburbs. To do this, the TCF provides a significant opportunity to invest in infrastructure to improve public and sustainable transport connectivity in some of England's largest cities. This scheme will be funded through Tranche 2 of the fund, which received Department for Transport's approval in March 2020.
- 4.158 Skipton Railway Station is the second busiest rail station in North Yorkshire serving over 1.2 million passenger journeys per year with passenger demand anticipated to grow significantly in the future. Despite its high level of usage and importance as a travel hub, the existing station gateway has limited accessibility by walking and cycling, and limited opportunities for rail-bus interchange.
- 4.159 The proposed scheme aims to enhance the forecourt of the Skipton railway Station Gateway area and improve the pedestrian routes between the Railway Station, the bus station, the town centre, and the planned developments and existing education and employment sites through the provision of improved walking corridors.
- 4.160 The proposed interventions will transform Skipton Rail Station into a sustainable travel hub improving the town's and district's connectivity with Leeds, Bradford, and the wider region, supporting inclusive and sustainable future economic growth. The small, compact nature of Skipton town and the location of future developments demonstrate the scheme's potential to encourage behaviour change and stimulate a shift from car to walking, cycling, rail and bus travel.

4.161 The scheme will support the TCF programme objective of increasing walking, cycling, and bus trips, which will help contribute to reducing carbon emissions and improving local air quality, and support delivery of the West Yorkshire Mayoral pledge of Tackling the Climate Emergency and priorities of the Strategic Economic Framework such as Enabling Inclusive Growth.

4.162 The scheme consists of the following five complementary elements:

- Component 1 - Skipton Railway Station Gateway
- Component 2 - Broughton Road Active Travel Corridor
- Component 3 - Railway Station to Auction Mart Canal Footpath Improvements
- Component 4 - Railway Station to Bus Station Active Travel Improvements
- Component 5: Gallows Bridge Replacement

4.163 The proposed scheme is presented as two phases, with Phase 1 deliverable within the current Transforming Cities Fund and North Yorkshire Council funding allocation. North Yorkshire Council are actively seeking additional funding to deliver the scheme as a whole. Phase 1 will deliver components 3, 4 and 5 and Phase 2 will deliver components 1 and 2.

4.164 At the Investment Committee in June 2021 the outline business case was approved to deliver all five components outlined above. However, due to inflationary pressures and a greater understanding of the final costs it has become apparent that delivery of all components is not possible within the Transforming City Fund allocation. North Yorkshire Council have therefore proposed to deliver those components within Phase 1 within the Transforming Cities Fund allocation.

4.165 The schemes objectives are.

- Increase modal share of journeys travelling to/from Skipton Railway Station on foot.
- Increase usage of Skipton Railway Station for travel between Skipton and wider city region for all journey purposes.
- Deliver improved walking infrastructure and pedestrian facilities across Skipton town centre.
- Improve access to education, employment, and training opportunities within Skipton centre via active and sustainable modes, thereby reducing car dependence.
- Support plans for the development of key employment sites and housing developments in Skipton.
- Contribute towards improving local air quality & reducing carbon emissions.
- Positively enhance the local environment by incorporating innovative design principles which facilitate the delivery of green/blue infrastructure.

- 4.166 Following delays to the TCF programme nationally, beyond the March 2023 TCF programme end-date, an independent assurance review of the 12 City Regions was commissioned by the Department for Transport (DfT) and undertaken between January and March 2023. The review provided a snapshot in time of each City Region's programme affordability and achievability, with an overall delivery confidence assessment.
- 4.167 The DfT has advised the Combined Authority that the TCF term will be extended, however additional governance will be implemented to monitor delivery across the North Yorkshire schemes and additional approvals from the DfT will be required to provide funding certainty for spend in Financial Year 24/25 for these schemes. The DfT have therefore instigated a Stage Gate process, whereby additional independent reviews of the schemes Full Business Cases will be undertaken across the North Yorkshire schemes prior to award of construction contracts. The Stage Gate reviews are focused on assuring that the schemes are deliverable and that the spend profiles are realistic.
- 4.168 A summary of the scheme's business case and location map is included in **Appendix 6**.

### **Outputs and Outcomes**

- 4.169 The scheme outputs include:

#### Phase 1

- 1.5km of new or upgraded pedestrian infrastructure.
- Two new/upgraded crossing points.
- Upgrade one pedestrian footbridge including a new pedestrianised area providing improvements to access and connectivity to the bus station and safety enhancements.
- Footway enhancements and junction reconfiguration between the train station and bus station.

#### Phase 2

- Enhancements to the forecourt of the station and improved access to the rail station entrance, including planting and soft landscaping measures.
- Footway improvements and associated safety and wayfinding measures including improved pedestrian crossing facilities on Broughton Road.

- 4.170 The scheme outcomes are:

- 4% increase in the number of people accessing Skipton Station Gateway on foot by 2030.
- 4% increase in rail patronage at Skipton Station by 2036.
- 3.6 Hectares of commercial space developed by 2032.
- 442 housing units developed by 2032.
- 1% Reduction in vehicle kms travelled by 2030.

- 4% increase in the proportion of people accessing the Auction Mart site on foot by 2030.
- Achieve a biodiversity net gain on opening.

4.171 The value for money assessment reflects a Benefit Cost Ratio of 4.25:1 for the Phase 1 scheme, which assessed against the Department for Transport's value for money criteria judges the scheme as very high value for money.

4.172 The value for money assessment reflects a Benefit Cost Ratio of 3.03:1 for the Phase 1 & Phase 2 scheme, which assessed against the Department for Transport's value for money criteria judges the scheme as high value for money.

### **Tackling the Climate Emergency Implications**

4.173 The scheme tackling climate emergency implications are:

- Delivery of improved walking routes between the railway and bus stations and the enhancement of the station gateway area will make travel by bus and train more attractive.
- By encouraging walking and public transport trips this will substitute private car journeys, resulting in lower carbon emissions.

4.174 The scheme puts a focus on people and placemaking to support and attract further inward investment into Skipton and working towards a Carbon-Zero Economy for the district and wider City Region through low carbon interventions in design and post scheme usage.

4.175 A carbon impact assessment indicated a carbon reduction of 573 tonnes of CO<sub>2</sub>e over a 60-year appraisal period. Therefore, carbon savings due to more walking and public transport usage and less private car journeys are predicted to outweigh the carbon emissions involved in constructing the scheme.

### **Inclusive Growth Implications**

4.176 The scheme inclusive growth implications include:

- The scheme will facilitate inclusive growth through enabling enhanced accessibility for more people and communities in what was previously the Craven District, to access opportunities across the wider region, particularly in terms of more deprived areas within proximity of the town centre. The scheme will also increase rates of active travel and productivity and deliver associated health and well-being benefits.
- Good public spaces can help to increase business and investor confidence, boost property prices and thereby increase business rate income, enhance the labour, and retail market catchments of the town centre and support the diversification of the town centre retail market, making it more resilient. Together, these impacts help to drive inclusive growth.



## **Equality and Diversity Implications**

- 4.177 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.
- 4.178 The project would not have an adverse impact on any of the protected characteristics identified in the Equalities Act 2010, and indeed ought to improve for some people. The scheme will enhance accessibility for people with disabilities by improving surfaces, reducing obstacles, and reducing conflicts with other road users.
- 4.179 Through the delivery of walking improvements and improvements in access to public transport, the scheme will ensure equality of opportunity in terms of access to education and training provision. It will better connect areas around the town centre to Skipton Railway Station, including more deprived areas within proximity to the town centre. This will deliver enhanced levels of access to education and training opportunities across the wider region.

## **Consultation and Engagement**

- 4.180 The promoters have undertaken two rounds of public consultation and engagement on the scheme and have also consulted with key stakeholders, including local members, the Canal and River Trust, Network Rail, Northern Trains, North Yorkshire Fire & Rescue, Morrisons and Tesco. Details can be found at <https://www.yourvoice.westyorks-ca.gov.uk/skipton>.

## **Risks**

- 4.181 The scheme risks and mitigations are:
- That the existing Gallows Bridge walls are unstable during the works and require stabilisation. This will be mitigated by site inspections, temporary works to 'buttress' the outside of the walls where stability is uncertain to provided support during construction works and work undertaken by hand with minimal use of breakers etc
  - That there are unforeseen ground conditions. This will be mitigated by further inspections, early works and a review with local highways teams of known issues on highways or from developments working in the area.
  - That procurements of materials introduce delays due to material availability and meeting required timescales. This will be mitigated by materials being ordered in advance prior to works commencement or seeking an alternative supplier if required.

## **Costs**

- 4.182 The total scheme costs for Phase 1 are £7,171,771. The total scheme costs for Phase 1 and Phase 2 are £15,070,000.
- 4.183 The Combined Authority's contribution is £6,971,771 from the Transforming Cities Fund.

4.184 The remaining funding is £200,000 from North Yorkshire Council.

4.185 Should the Combined Authority retain the scheme post FBC (decision point 4) then the Combined Authority will need to enter into a funding agreement with North Yorkshire Council for expenditure of up to £6,972,000 from the Transforming Cities Fund.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team  Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	06/06/2025

### Other Key Timescales

- Contractor award and mobilisation - 01/07/2024
- Start on site - 23/09/2024
- Completion on site - 06/06/2025

### Assurance Tolerances

4.186 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	Approval at DP3	Requested approval by the CA at DP3	Within tolerance?
<b>Date</b>	25/06/20		08/06/21	14/03/24	
<b>Total Cost</b>	£6,201,163		£7,831,000	£15,070,000	
<b>Combined Authority Funding</b>	10%	£5,803,000	£7,631,000	£6,971,771	N
<b>Completion Date (DP5)</b>	6 months	31/03/23	30/06/23	06/06/25	N
<b>Outputs &amp; Benefits</b>	N/A	As per report	As per report	As set out in this report	Y

4.187 The revised assurance tolerances for the recommended approval in this report are:

### Assurance tolerances

Combined Authority funding remain within +10% of those outlined in this report.

Completion/service delivery date remains within +6 months of those outlined in this report.

Outputs remain within -10% of those outlined in this report.

## Appraisal Summary

- 4.188 The scheme has a strong strategic case that aligns with the overarching Transforming Cities Fund objectives and the key priorities of the West Yorkshire Combined Authorities Strategic Economic Framework. The scheme will potentially deliver a high BCR with scheme benefits being related to health and journey ambience improvements for pedestrians and rail users, in full alignment to the strategic scope and scheme's aspirations. The scheme is also expected to support future housing and employment growth in Skipton town.
- 4.189 There have been changes to the scheme design between outline business case and full business case stages. The scheme now focuses on enhancing the pedestrian environment, through widened footways, enhancements to the walking environment and the introduction of landscaping and planting, rather than providing dedicated cycle infrastructure.
- 4.190 Whilst the strategic case is well set out and there is a clear and compelling market failure, it is considered that the proposed scheme, particularly due to the de-scoping and phasing, may not sufficiently address the underlying issues. Further investments will be needed to provide the scale of change that is needed in the town.
- 4.191 It is set out that the target cost will be agreed between NYC and the contractor once FBC approval has been given, and that NYC still reserve the right not to proceed to the construction phase or seek alternative delivery if a target cost cannot be agreed. Therefore, some risk remains that the costs may be higher than anticipated which could impact on funding requirements or mean that the scope or quality of the scheme may need to be revised.
- 4.192 Planning permission has been granted for the scheme and the need for rail industry consents is not required for delivery of the Phase 1 scheme. Final approvals are required from the Canal and River Trust for the Gallows Bridge replacement works. This means that there are still associated risks of delay to programme and potential cost escalation.

## Recommendations

- 4.193 The Combined Authority approves that, subject to the successful outcome of the Department for Transport's Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:
- (i) The Skipton Station Gateway scheme proceeds through decision point 4 (FBC) to activity 5 (Delivery).

- (ii) Approval of the Combined Authority's contribution of £6,971,771 for Phase 1 is given. The total scheme value for Phase 1 is £7,171,771. The total scheme value for Phase 1 and Phase 2 is £15,070,000.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £6,971,771, subject to confirmation from the Department for Transport that funding for FY 24/25, 25/26 and 26/27 is available.
- (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>TCF Selby Station Gateway</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	4 (full business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.194 This scheme will be funded through the Department for Transport's Transforming Cities Fund (TCF). As part of the Government's Industrial Strategy and the National Productivity Investment Fund, the TCF aims to drive up productivity through improved connections between urban centres and suburbs. To do this, the TCF provides a significant opportunity to invest in infrastructure to improve public and sustainable transport connectivity in some of England's largest cities. This scheme will be funded through Tranche 2 of the fund, which received Department for Transport's approval in March 2020.
- 4.195 The Selby Station Gateway scheme looks to enhance the rail station's status as a sustainable transport gateway to the town, providing better access by walking and cycling and more seamless integration between all modes of travel.
- 4.196 The scheme includes transformative measures focussed on Selby Rail Station and its surrounding area. The scheme scope has been revised from that presented at outline business case (decision point 3) and has been split into two phases because of inflation cost impacts. The first phase will be funded utilising Transforming Cities Fund.
- 4.197 Since outline business case approval at Place Regeneration and Housing Committee on 22 February 2022, the scheme with phase 1 being funded by the Transforming Cities Fund, North Yorkshire County Council are investigating funding to deliver phase 2. Phase 1 comprises the following elements:
- Selby Station Gateway.
  - Ousegate Active Travel Corridor.
  - Eastern Station Access.

4.198 North Yorkshire Council are investigating potential funding streams for phase 2, which consists of:

- New segregated cycle track near to the bus stop and layover facilities, connecting with the Bawtry Road underpass.
- The Crescent junction crossing enhancements.
- New pedestrian/cycle underpass underneath Bawtry Road connecting Portholme Road with the bus and railway stations.

4.199 The phase 1 scheme focuses on measure in and around Selby Station aimed towards driving modal shift from private cars to more sustainable modes of transport by providing accessible, attractive, and cleaner travel alternatives, further ensuring planned local growth occurs in a sustainable manner. The scheme consists of:

#### Selby Station Gateway

- Improvements to rail and bus facilities, including the refurbishment of the rail station building frontage.
- Making Station Road one way, to allow space to widen footpaths and introduce a cycle lane. Also Introducing a 20mph speed limit.

#### Ousegate Active Travel Corridor

- A new one-way system, 20mph speed limit and segregated cycle lane
- Closure of Denison Road canal bridge to motor vehicles
- Reconfiguration of the Ousegate / A19 junction including new crossings

#### Eastern Station Access

- A new car park and ramped pedestrian and cycle access into the rail station from Cowie Drive
- Demolition of James William House

Additionally, and separately, the council will deliver a new plaza and improvements to the park.

4.200 The scheme's objectives are:

- Improve access to Selby Rail Station by public transport, cycling and walking
- Improve the quality of the user experience and levels of satisfaction in the Selby Station Gateway area
- Support plans for the development of key employment sites in Selby
- Contribute towards improving local air quality and reducing carbon emissions
- Positively enhance the local environment by incorporating innovative design principles which facilitate the delivery of green/blue infrastructure.

- 4.201 Following delays to the TCF programme nationally, beyond the March 2023 TCF programme end-date, an independent assurance review of the 12 City Regions was commissioned by the Department for Transport (DfT) and undertaken between January and March 2023. The review provided a snapshot in time of each City Region's programme affordability and achievability, with an overall delivery confidence assessment.
- 4.202 The DfT has advised the Combined Authority that the TCF term will be extended, however additional governance will be implemented to monitor delivery across the North Yorkshire schemes and additional approvals from the DfT will be required to provide funding certainty for spend in Financial Year 24/25 for these schemes. The DfT have therefore instigated a Stage Gate process, whereby additional independent reviews of the schemes Full Business Cases will be undertaken across the North Yorkshire schemes prior to award of construction contracts. The Stage Gate reviews are focused on assuring that the schemes are deliverable and that the spend profiles are realistic.
- 4.203 A summary of the scheme's business case and location map is included in **Appendix 7**.

### **Outputs and Outcomes**

- 4.204 The scheme outputs include:

#### Selby Station Gateway

- External refurbishment of station building including replacement entrance and windows and cladding of the exterior.
- Making Station Road one-way (northbound) will reduce vehicle dominance and provide space to implement a new southbound contraflow cycle lane and wide footways (0.4km of carriageway reconfiguration).
- Changes to Station Road also include new signage, wayfinding, and the introduction of a 20mph speed limit.

#### Ousegate Active Travel Corridor

- New 20mph speed limit
- New 240m segregated eastbound cycle lane
- New westbound 240m on carriageway cycle lane
- New one-way system between Cowie Drive and Ousegate beneath the existing rail bridge
- Closure of Denison Road canal bridge to vehicles to reduce traffic flows along Shipyard Road and Ousegate
- Junction reconfiguration and signal upgrade at the Ousegate/A19 junction, including two new crossings

#### Eastern Station Access and Cowie Drive Car Park

- New ramped pedestrian and cycle access to Selby station platforms 2 and 3 at the eastern extent of the station
- New 0.18 hectare surface car park on Cowie Drive (including passive EV charging provision and disabled parking provision)
- 0.20km carriageway reconfiguration and associated changes to road markings and signage, including enhanced cycle and pedestrian infrastructure.
- Demolition of 1 building unit: James William House site (former Tando Fabrications) to create the new car park.

4.205 The scheme outcomes are:

- 5% increase in the number of people accessing Selby Station on foot by 2031
- 6% increase in the number of people accessing Selby Station by bike by 2031
- 5% increase in user satisfaction levels across the Gateway area by 2031
- 1% increase in footfall in the Station Gateway area by 2031
- 0.2% increase in Selby Rail Station users (beyond background growth forecasts) by 2031
- 0.3 hectares of Commercial land (B2/B8) brought forward for development by 2031
- 10% uplift in existing property land value within 500m, and 2.5% uplift in existing property land value with 500-1500m by 2031
- Reduction in 143,955 vehicle kms travelled annually (average) by 2031
- 0.1% reductions in carbon dioxide and nitrogen dioxide emissions by 2031
- Achieve 10% biodiversity net gain

4.206 The benefit cost ratio for the scheme is 0.31:1 which is classified as Poor value for money (VfM).

4.207 The Poor VfM rating is largely as a result of highway user disbenefits, such as increased journey times from the closure of the Denison Road bridge. The sensitivity tests undertaken show that when the highway impacts are removed, the value for money category is High.

### **Tackling the Climate Emergency Implications**

4.208 The carbon impact modelling on the scheme (phases 1 and 2) shows a negative impact on carbon emissions, producing overall an additional 28,916 tonnes of carbon dioxide equivalent (tCO<sub>2</sub>e) over the 60 year appraisal period. Of this 1,773 tCO<sub>2</sub>e is capital carbon due to the construction of the scheme, the remainder is additional emissions due to higher distances travelled by vehicles.



4.209 This reported increase in carbon emissions is mainly the result of modelled rerouting impacts from the closure of Denison Bridge. It is expected the carbon impacts from traffic changes will be significantly less than the modelling indicates. However, even allowing for a reduced scale of traffic disbenefits, there would still be a net increase in carbon emissions.

### **Inclusive Growth Implications**

4.210 The scheme inclusive growth implications include:

- Improving the accessibility of the rail station and services by low cost travel methods such as walking and cycling. This will improve access to employment, education and other opportunities and will be of particular benefit to those on low incomes.
- Supporting the development of key employment sites in Selby.

### **Equality and Diversity Implications**

4.211 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

4.212 The scheme's equality and diversity implications are:

- The scheme will have positive impacts for some protected characteristic groups such as Age and Disability.
- No negative impacts are envisaged for any protected characteristic groups.
- The scheme will improve accessibility, particularly for those with mobility impairments by removing obstacles and conflicts and providing improved surfaces and new seating.

### **Consultation and Engagement**

4.213 The promoters have undertaken 3 rounds of public consultation on the scheme and have also engaged with key stakeholders, including Network Rail and the Train Operating Companies. No further consultation is planned. The third round of consultation took place in October and November 2021, details can be found at [Selby Station Gateway | Your Voice \(westyorks-ca.gov.uk\)](https://www.westyorks-ca.gov.uk/selby-station-gateway-your-voice)

### **Risks**

4.214 The scheme risks and mitigations are:

- Detailed Design may not be accepted by rail industry organisations (within required timescales). This is mitigated by regular liaison with Network Rail (NR) and TransPennine Express, allowing them to have early visibility of the design to acquire informal feedback prior to formal submission. Pre-briefing other train operating companies (TOCs) prior to Station Change application.

- Signal ducting: No capacity to reuse ducting for Ousegate/A19 (and The Crescent/Bawtry Rd) junctions works. This is mitigated by carrying out ducting surveys before construction commences and regular engagement with traffic signals team during construction.
- Ground and building conditions may be worse than anticipated and/or contaminated. This is mitigated by excavating trial holes to verify ground penetrating radar survey results and potentially amending design on site if need.
- Unexpected, buried services, structures, lighting, highways, landscaping, signal poles, archaeology, and utilities could be encountered during construction. This is mitigated by reviewing extents/depths of excavation to reduce risks where possible. Ensuring statutory undertakers enquiries are carried out. Ensuring archaeology planning conditions are in place prior to construction. Skim planning and overlaying will be utilised where feasible as an alternative to full excavation.

### Costs

4.215 The total scheme costs are £25,375,508.

4.216 The Combined Authority's contribution is £20,289,375 from the Transforming Cities Fund (TCF).

4.217 The remaining funding is £5,086,133 from NYC capital funds.

4.218 The Combined Authority will need to enter into an addendum to the existing funding agreement for up to £20,289,375 from the Transforming Cities Fund (TCF) with North Yorkshire Council, subject to confirmation from the Department for Transport that funding for Financial Years 2024/25, 2025/26 and 2026/27 is available.

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team  Decision Combined Authority's Director of Transport, Policy and Delivery (DoTPD): Choose an item.	27/11/2026

### Other Key Timescales

- Start of delivery – 30/09/24
- Completion date – 31/10/26

### Assurance Tolerances

4.219 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	Approval by the CA at DP3	Change Request Approval	Requested approval at DP4	Within tolerance?
<b>Date</b>	25/06/20		22/02/22	11/09/23	14/03/24	
<b>Total Cost</b>	£20,756,691		£20,502,216	£22,057,000	£25,375,508	
<b>Combined Authority Funding</b>	10%	£17,650,000	£17,650,000	£20,000,000	£20,289,375	Y
<b>Completion Date (DP5)</b>	6 months	31/03/23	26/09/2023	21/07/25	30/10/26	N
<b>Outputs &amp; Benefits</b>	-	-	10% As per report	As per report	As per report	Y

4.220 The revised assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +10% of those outlined in this report.
Completion/service delivery date remains within +6 months of those outlined in this report.
Outputs remain within -10% of those outlined in this report.

### Appraisal Summary

4.221 In the strategic case, the policy fit and case for change are well explained. The promoter has carried out three rounds of public consultation and can point to a high level of support and can demonstrate that the consultations have shaped the proposals.

4.222 The economic case has not yet been fully appraised, but the promoter assesses that the value for money position is a benefit cost ratio of 0.31:1 which is categorised as Poor value for money. This can be seen to result from the modelled highway disbenefits caused predominantly by re-routing motorised traffic. The promoter contends that the actual highway disbenefits may well be less than the modelled results citing the observed impacts of a recent temporary closure of the canal bridge, which will be permanently closed to motor vehicles in the scheme.

4.223 The commercial case is well established with a contractor already in place following an appointment on an Early Contractor Involvement basis. This has enabled contractor input into final detailed design and early planning for wider supply chain and works phasing considerations.

4.224 There is uncertainty in the financial case as the final scheme price has not been confirmed, so affordability potentially remains an outstanding issue.

Since the last approval, the promoter has requested an additional £289,375 of TCF funding through the DfT's change control process. The DfT have now confirmed that the request has been approved.

- 4.225 The management case presents uncertainties, as several statutory and regulatory consents remain outstanding and again failure to obtain these within the timescales required could impact on programme and cost. The acquisition of one parcel of land is also still in process, but the promoter feels that this is a low risk.
- 4.226 Overall, the submission provides sufficient assurance to recommend approval, subject to the recommended conditions.

### **Recommendations**

- 4.227 The Combined Authority approves that, subject to the successful outcome of the Department for Transport Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:
- (i) The Selby Station Gateway scheme proceeds through decision point 4 (full business case) and work commences on activity 5 (delivery)
  - (ii) Approval to increase the Combined Authority's contribution for phase 1 by £289,375, from £20,000,000 to £20,289,375 is given, with the additional contribution to be funded by reallocating £289,375 from the TCF Skipton scheme. The total scheme value for phase 1 is £25,375,508. The total scheme value for phase 1 and 2 is £32,535,508.
  - (iii) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £20,289,375, subject to confirmation from the Department for Transport that funding for Financial Years 2024/25 and 2025/26 is available.
  - (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>Kirklees Speed Limit Review</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 to 4 (business justification)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.228 This scheme will be funded from the City Regional Sustainable Transport Settlement (CRSTS) Fund. The £830m CRSTS fund was awarded in the summer of 2022 and was made possible due to the devolution arrangements upon becoming a Mayoral Combined Authority in May 2021. CRSTS aims to deliver schemes to tackle congestion, improve air quality and make sustainable transport (public transport, walking and cycling), the first choice of transport for people in West Yorkshire. It will enable the transport network to adapt to meet the needs of the expanding population of West Yorkshire, and the pressure this creates on the network, so that public transport becomes an attractive and truly viable alternative to the car.
- 4.229 In September 2021, Kirklees Council published their speed limit review, which was undertaken in line with the Department for Transport's (DfT) guidance to Transport Authorities to keep their speed limits under review and to consider the introduction of 20mph speed limits and zones as over time, as appropriate, in order to increase safety to pedestrians and road users. This scheme will implement a significant number of the review's recommendations, with a primary focus on improving road safety.
- 4.230 This will be delivered through a package of interventions which will include the review of existing 20mph speed limit zones, the production of school travel action plans as well as the replacement of missing or damaged speed limit signs and lines.
- 4.231 This scheme will provide replacements for missing or damaged speed signage, rectify any related traffic regulation order discrepancies (road lining and signage) and the review of the existing 20mph speed limit zones. In addition, 36 school action plans will be produced, and it is expected that up to three of these plans will be implemented within the scope of this scheme, all of

which will improve safety and encourage increased uptake of active forms of travel, such as walking or cycling.

4.232 The scheme objectives are:

- To tackle the climate emergency by encouraging a shift from cars to more sustainable modes of transport such as walking and cycling, speed reduction and improved driving styles especially around school streets and built-up areas. This scheme has a target of a minimum 6.3% move from car use to more sustainable forms of transport in the areas around schools, with action plans to be implemented within 2 years of their finalisation.
- To improve safety outside schools to protect children, who are one of our most vulnerable user groups achieving zero killed or serious injury (KSI) collisions in line with the regional vision zero ambition.
- To ensure speed limits across the district are both appropriate and legally enforceable in order to reduce collisions and contribute to Vision Zero.

4.233 A summary of the scheme's business case is included in **Appendix 8**.

### **Outputs and Outcomes**

4.234 The scheme outputs include:

- Replacement of 132 missing or damaged speed limit terminal signs across the district.
- Resolution of 46 discrepancies between signage/lining and the existing Traffic Regulation Orders (TRO).
- Replacement of 212 damaged speed limit repeater signs.
- Completion of a desktop review to provide key recommendations for existing 20mph zones in Kirklees utilising existing speed data.
- Production of 36 school action plans.
- Implementation of interventions of 2-3 school action plans.

4.235 The scheme outcomes are:

- Improved safety from speed limit compliance, contributing to the region's overall target of reducing Killed or Serious Injured (KSI) road collisions to zero by 2040.
- Reduction in car travel to schools by 6.3%, with a switch to sustainable transport modes, such as walking and cycling, by encouraging and enabling behaviour change.

### **Tackling the Climate Emergency Implications**

4.236 The scheme's tackling climate emergency implications are:

- Contributing to lowering carbon emissions from reduced traffic speeds and by encouraging a shift to walking and cycling for school related trips, instead of the car.

4.237 A Stage 1 (activity 2) Carbon Impact Assessment has been provided which in general assumes no adverse impacts in relation to carbon emissions. A positive impact in terms of greenhouse gas emissions and air quality is expected as a result of behaviour change leading to a shift from car travel to more sustainable modes.

4.238 Quantification of carbon changes is not available at this stage of the scheme, due to the as the early stage of intervention identification and planning. Carbon changes will continue to be monitored and factored into the planning and delivery of interventions throughout this scheme.

### **Inclusive Growth Implications**

4.239 The scheme inclusive growth implications include:

- Improved road safety and the development of school active travel action plans will target low income communities, improving access to education and training for those people who rely on walking and cycling and do not own a car.

### **Equality and Diversity Implications**

4.240 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

4.241 Positive impacts are anticipated for all users, including protected groups as defined in the Equality Act 2010, including:

- Age – Improved safety for children by limiting car use and reducing speeds around schools. This will also contribute to improved air quality, supporting health benefits for all ages.
- Disability - Improved access to the highway through improvements in safety. Disabled users are to be considered specifically in the engagement for school action plans to address any specific barriers to more active forms of transport for this group. Improvements to air quality improvements will particularly benefit this group.
- Pregnancy / maternity - Improved access to the highway for pushchair or buggy users will be considered during the engagement and production of action plans.
- Sex – Safety for women and girls will be enhanced through improvements to natural surveillance.

4.242 Further work on equality and diversity impacts will be carried out as part of developing the school action plan and design of schemes to be implemented.

## **Consultation and Engagement**

4.1 Consultation and engagement has not been undertaken for this scheme at this stage. Engagement is being planned, with different approaches for the different scheme elements proposed:

- Replacement of missing or damaged signage – engagement will comprise informing councillors of the works and providing programme updates due to small construction impacts involved.
- Traffic regulation order (TRO) discrepancies changes – the TRO changes are subject to a statutory consultation process, and ensures that stakeholders key stakeholders, including residents or resident groups, emergency services and action groups are engaged.
- School action plan production and implementation – this will be undertaken following funding being secured and will involve the creation of a working group and surveying parents, residents/resident's groups and school children, engagement with the school staff, boards and relevant councillors.

## **Risks**

4.2 The scheme risks and mitigations are:

- Inflation significantly increases costs, affecting the scheme's affordability and deliverability. This is mitigated through a 10% risk contingency applied and ringfenced to each individual workstream, to prevent increases in cost to one work stream reducing the funding available to others. If required, the scope of impacted workstreams will be reviewed and reduced if necessary.
- Risk that maintenance costs have not been costed in, affecting the lifespan and quality of signage. This is to be mitigated by prioritising its maintenance against other safety critical highways signage.

## **Costs**

4.3 The total scheme costs are £1,052,000.

4.4 The Combined Authority's contribution is £900,000 from the CRSTS Fund.

4.5 The remaining funding is £152,000 from Kirklees Council's Highways Safety Team budget.

4.6 At decision point 1 (strategic assessment) £25,000 of development costs were approved to develop the business justification.

4.7 As part of this decision point 2-4 (business justification case), the scheme seeks full approval of £875,000, taking the total approval to £900,000.

4.8 The Combined Authority will need to enter into a funding agreement with Kirklees Council for expenditure of up to £900,000 from the CRSTS Fund.



## Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team  Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	31/03/2027

### Assurance Tolerances

- 4.9 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
<p>Combined Authority funding remain within +10% of those outlined in this report.</p> <p>Completion/service delivery date remains within +6 months of those outlined in this report.</p> <p>Outputs remain within -10% of those outlined in this report.</p>

### Appraisal Summary

- 4.10 The scheme aims to provide highway safety enhancements through encouraging speed limit compliance and enabling speed limit enforcement, particularly in the vicinity of schools. This aims to reduce collision rates on the district highways and enhance the attractiveness of using active travel for school trips due to the perception of improved safety.
- 4.11 The general principle of the scheme aligns, strategically, with the aims and aspirations of a number of policies and strategies of the Combined Authority, such as the Strategic Economic Framework, West Yorkshire Plan and the West Yorkshire Investment Strategy, as well as the Mayor's Pledges, due to benefits relating to inclusive growth, promotion of sustainable forms of travel and contributing to the reduction of carbon emissions.
- 4.12 A high-level economic appraisal of the scheme was undertaken, and this indicated that the benefits of the scheme would outweigh the costs, albeit it would offer low value for money.
- 4.13 The project is to be split into different workstreams for the different elements of the scheme and these will follow different delivery timeframes, but all works are to be complete by March 2027. The replacement signs and lining changes are expected to be delivered sooner but more time is involved in developing the school action plans, implementation of measures and scheme monitoring to understand the impacts of the interventions. Consultation and engagement is planned to target key stakeholders but will be limited in scope and scale given the value of the schemes. Engagement with the schools is expected to commence once delivery funding has been confirmed.

## **Recommendations**

- 4.14 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:
- (i) The Kirklees Speed Limit Review scheme proceeds through decision point 2 - 4 (business justification case) and work begins on activity 5 (delivery).
  - (ii) Full approval to the Combined Authority contribution of £900,000, is given. The total scheme cost is £1,052,000.
  - (iii) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £900,000.
  - (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### Projects in Stage 3: Delivery and Evaluation

<b>Project Title</b>	<b>CIP A58 – A672</b>
<b>Stage</b>	3 (delivery and evaluation)
<b>Decision Point</b>	Change request (activity 4)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

### Background

- 4.15 The A58/A672 corridor improvement scheme is being delivered through the Corridor Improvement Programme (CIP) funded by the West Yorkshire-plus Transport Fund (WY+TF).
- 4.16 The WY+TF is a £1 billion fund covering West Yorkshire and York. The objectives of the WY+TF are to enable key employment and housing development areas and help create about 20,000 new jobs over the next 10 years. These strategic transport projects will be delivered to facilitate the growth priorities identified in the Leeds City Region Economic plan.
- 4.17 The CIP programme supports the WY+TF by delivering schemes which will improve connectivity and remove constraints to housing and employment growth in the Spatial Priority Areas identified in the Leeds City Region Strategic Economic Framework (SEF).
- 4.18 The A58/A672 scheme includes a package of small-scale transport interventions to improve highway efficiency for the benefit of all road users along part of the West Yorkshire Key Route Network (WYKRN), comprising the A58/A672 between Halifax and the M62 Junction 22 via Sowerby Bridge, Ripponden, and Rishworth.
- 4.19 The scheme includes junction improvements and highway reconfiguration, new traffic signals, introduction of traffic management measures such as parking restrictions, bus stop access and facility improvements, the provision of pedestrian crossing facilities, cycle infrastructure and wayfinding signage. There are also public space improvements including the redevelopment of the area around Sowerby Bridge market, by demolishing the market building to

make provision for two ramped cycle routes onto the canal and a flexible market space.

4.20 The scheme will reduce journey times for all users along the corridor, supporting an improvement in journey reliability and reducing the levels of congestion, which will also improve the local air quality. Delivery of sustainable travel improvements will benefit bus users, pedestrians, and cyclists who wish to make local trips by bus, foot, or bike. The package of measures will also collectively improve road safety for all users.

4.21 The scheme is in activity 5 (Delivery) and construction started on the project in December 2021. A change request has now been presented due to revisions to the schemes scope, increase in costs, and to extend the delivery timescales.

#### Scope change

4.22 Removal of signalisation and proposed one way gyratory at the A58 junction with Station Road and Sowerby New Road. During the traffic regulation order process, issues were encountered in relation to the ability of heavy goods vehicles to negotiate the proposed one way gyratory. This led to the removal of this element of the scheme, however the proposed parking and footway improvements are to be retained.

4.23 Removal of the proposed cycle improvements along Pye Nest Road and between Swires Road and King Cross Road - Objections to the proposals during the TRO consultation process led to this element being removed.

#### Increase to scheme cost

4.24 As part of finalising the design and cost at the site of the former Sowerby Bridge market, it was identified an increase in costs were required to fully account for works to the underlying retaining structures for Sowerby Bridge market with an increase in costs to ensure that the intended design quality was maintained.

4.25 The A58/A672 scheme has additionally incurred a cumulative increase in cost of £684,990 because of inflation of materials required during construction so far, of which it secured an additional £380,550 from the WY+TF as part of the 2022 inflation review, with approval of a further £304,440 now sought to address the additional cost gap for inflation in the intervening period.

#### Delivery timescales

4.26 Because of the additional time needed to review the respective issues at A58 Station Road gyratory and the site of the former Sowerby Bridge market, a revised programme now forecasts construction to complete in December 2024.

### **Outputs and Outcomes**

4.27 The scheme outputs include:

- 1.0km of new cycle lanes.
- 0.47km of new shared space.
- 1.5km of improved pedestrian provision.
- Improvement to 7 bus stops/shelters.
- Installation of 3 Real Time Information screens.
- Upgrade to 1 Variable Message Sign equipment.
- Junction improvements, highway layout changes, and revised parking and loading measures at locations along the corridor.

4.28 The scheme outcomes are:

- Deliver journey time savings of up to 3 minutes in the peak periods of the modelled areas of Sowerby Bridge and Ripponden, supporting an improvement in journey times for all traffic travelling along the corridor by 5%.
- Improve access and promote housing growth through improving traffic flow on the highway network, with 377 new homes identified in the revised Calderdale Local Plan along the corridor.
- Improve safety for all users along the corridor, particularly for pedestrians and cyclists.
- Support improvement to air quality along the corridor by reducing vehicle congestion and queuing.

4.29 The benefit cost ratio (BCR) has reduced from 4.19 (very high) to 1.81 (medium). This is mainly because of a combination of increase in scheme costs and loss of highway user benefits following the removal of the one-way gyratory at the A58 Station Road junction.

### **Tackling the Climate Emergency Implications**

4.30 The scheme's tackling climate emergency implications includes:

- To support better local air quality by enhancing the operational efficiency of the highway network to reduce congestion levels and idle traffic.
- To deliver a low emission, sustainable transport system by improving the bus, walking, and cycling provision along the corridor, with improved bus stop locations and facilities, footway widening and improved crossing provision, and new cycle lanes.

4.31 The scheme business case pre-dates the Combined Authority's carbon impact assessment tool, so a whole life carbon assessment has not been carried out. The assessment previously submitted on the operational period indicated a modest carbon saving of 1,998 tonnes over a 60 year appraisal period.

### **Inclusive Growth Implications**

4.32 The scheme inclusive growth implications include:

- Delivery of the highway improvements will support better access for all to strategic sites such as employment, education, and housing.
- Delivery of bus, walking, and cycling improvements will further benefit lower income households who do not own a car, with better opportunity to access key sites via lower cost solutions of the bus, by foot, or by bike.
- Encouraging less car use will improve the local air quality and support health benefits for residents.

### **Equality and Diversity Implications**

4.33 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development. There is no change to the EqIA assessment as a result of this change request.

### **Consultation and Engagement**

4.34 The scheme carried out two rounds of public consultation in 2018 and 2020 respectively as part of developing the business case, and also consulted with key stakeholders including the Sowerby Bridge Development Board, local ward councillors, and local businesses. Details can be found here <https://www.yourvoice.westyorks-ca.gov.uk/ccip2>. Following approval of this change request, a comms exercise is planned to update the public and key stakeholders on scheme progress.

### **Risks**

- 4.35 The scheme risks and mitigations are:
- That inflation is higher than the tendered costs, impacting affordability. This has been mitigated by including appropriate inflation costs based on the latest indices with risk of further rises to be monitored on an ongoing basis.
  - That members do not support the revisions, impacting deliverability. This has been mitigated by engaging with members on business case development and proposed changes to the design, with this to continue during the construction phase.

### **Costs**

- 4.36 The total scheme costs are £6,775,769, which is an increase of £1,333,769 from the previous cost of £5,442,000 approved by Transport Committee on 14 December 2022 via the inflation review.
- 4.37 The Combined Authority is fully funding the scheme from the WY+TF.

### **Future Assurance Pathway and Approval Route**

Assurance pathway	Approval route	Forecast approval date
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5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel (PIP) Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	29/01/2025
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### Other Key Timescales

- Start of construction Sowerby Bridge central in May 2024
- Start of construction Sowerby Bridge west in June 2024
- Construction to complete for all elements by December 2024

### Assurance Tolerances

4.38 The previous approvals and assurance tolerances set are outlined below:

Control area	OBC		FBC	FBC+	Inflation Review (December 2022)	This change request	Within tolerance?
Date	2 August 2018		25 September 2020	30 July 2021	December 2022	14 March 2024	
Total Cost	£6,042,000		£4,947,000	£4,947,000	£5,442,00	£6,775,769	
CA Funding	+10%	£6,024,000	£4,947,000	£4,947,000	£5,442,000	£6,775,769	N
Completion Date (DP5)	+3 months	March 2021	November 2022	November 2022	December 2023	December 2024	N
Outputs /Outcomes	+/- %	N/A	N/A	N/A	N/A	Scope now revised	N

4.39 The revised assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

## **Appraisal Summary**

- 4.40 The scheme is currently on site. The reasons for the increase in the A58/A672 scheme costs are clearly set out and understood and further funding has been identified to complete delivery.
- 4.41 The increase to scheme costs plus the revisions to the scheme scope, notably the removal of the gyratory and loss of highway user benefits at the A58 Station Road junction however do have an impact on the value for money position. It is however documented that the scheme explored alternative solutions before submitting the proposed way forward.

## **Recommendations**

- 4.42 The Combined Authority approves that:
- (i) The change request for the A58/A672 Corridor Improvement scheme to increase the Combined Authority contribution by £1,333,769 from £5,442,000 to £6,775,769, to revise the scheme scope, and to extend the Delivery completion date (decision point 5) from December 2023 to December 2024.
  - (ii) The Combined Authority enters into an addendum to the existing funding agreement with Calderdale Council for expenditure up to £6,775,769.
  - (iii) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.



<b>Project Title</b>	<b>Zero Emission Bus Regional Area (ZEBRA)</b>
<b>Stage</b>	3 (delivery and evaluation)
<b>Decision Point</b>	Change request (activity 5)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	Paragraph 3	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.43 This scheme is funded by the Department for Transport's Zero Emission Bus Regional Area (ZEBRA) fund. It is part of a wider approach to addressing emissions from the region's bus fleet. It forms part of West Yorkshire's approach to addressing the climate emergency and contributing to the regional target to be net-zero carbon by 2038, with significant progress made by 2030.
- 4.44 The Combined Authority has declared a climate emergency and has a strategic aim to have a zero-emission bus fleet by 2036, with significant progress made by 2030.
- 4.45 This ZEBRA project is the first of three project phases making up the Zero Emission Bus (ZEB) programme that will invest in the conversion of the West Yorkshire bus fleet away from diesel vehicles. The ZEBRA project is currently introducing charging infrastructure and 136 zero emission buses in this programme on routes in Bradford, Leeds and Wakefield. Alongside this, work is ongoing on the planning and development of phase 2, which will introduce zero emission buses to Calderdale and Kirklees, and phase 3, which will identify and introduce zero emission buses to areas within West Yorkshire that are underserved by phases 1 and 2. Phase 2 and 3 will seek committee approval separately.
- 4.46 The Combined Authority's Zero Emission Bus Regional Area (ZEBRA) programme is being delivered in partnership with bus operators in West Yorkshire.
- 4.47 The scheme supports the West Yorkshire Climate and Environment Plan 2021-2046 by reducing emissions and complements the Bus Improvement Plan for raising the quality of bus services and the travel experience to level up communities and encourage drivers to leave their cars at home.
- 4.48 The project now comes forward to request:

- Scope changes and an extension to project timescales to the ZEBRA project (Phase 1).
- Accept new funding from the second round of Zero Emission Bus Regional Area funding (ZEBRA 2), if awarded by the Department for Transport (DfT) and extend project delivery timescales.

Scope changes and extend project delivery timescales to the ZEBRA project (Phase 1).

- 4.49 Reallocation of previously approved funding between partner bus operators is requested. This will result in an additional 5 zero emission buses being added to the West Yorkshire bus fleet. No additional funding is sought for this element. The full details are available in exempt Appendix 9.
- 4.50 An extension of delivery completion timescales is requested. The full details are available in exempt Appendix 9.

Accept new funding from ZEBRA 2, if awarded by the Department for Transport (DfT) and extend project delivery timescales.

- 4.51 In September 2023, the Department for Transport (DfT) launched the second round of Zero Emission Bus Regional Area funding (ZEBRA 2), with £129 million to be awarded between successful bidders. As with the first ZEBRA fund, all monies will be exclusively used to purchase zero emission buses and install associated charging infrastructure. These will be ‘top of the range’ buses equipped with the latest technology and passenger features including superfast 4G Wi-Fi, phone holders with USB and wireless power charging at each seat and reading lights. This project will continue to introduce ‘top of the range buses’ to those most in need of levelling up.
- 4.52 Bus operators will continue to contribute substantial match funding investment but without the provision of grants, these buses would not be introduced so soon, on this scale or to the communities targeted. In addition, the introduction of the zero emission buses will allow the oldest and most polluting buses to be removed from service.
- 4.53 The Combined Authority has submitted a bid for ZEBRA 2 funding and hopes to be awarded up to £6,196,125. The DfT will award funding at the end of March 2024, and the project comes forward to request full approval for spending up to this amount if successful. This would provide an additional 41 zero emission buses and associated charging infrastructure and would bring the total zero emission buses to be delivered by this scheme to 182. Advance approval to spend the ZEBRA 2 funding, if it is awarded, is now sought so that orders for the zero emission buses can be placed immediately. This must be done by May 2024 to secure manufacturing slots so that the vehicles can be built and delivered in time to meet the DfT’s funding timescales. Full details are available in exempt Appendix 9.

**Outputs and Outcomes**

- 4.54 The scheme outputs include:

- Introduce 141 zero emission buses to West Yorkshire from March 2024. If ZEBRA 2 funding is awarded this will rise to 182.
- Charging infrastructure to support the provided zero emission buses.

4.55 The scheme outcomes are:

- Reduction in carbon emissions by 7,000 tonnes of carbon dioxide equivalent (COe) per year.
- Improved Air Quality by reducing emissions of 50 tonnes of Nitrogen Oxides (NoX) per year.
- Increased proportion of zero emission buses on the West Yorkshire bus network.
- Improved customer experience through provision of high specification zero emission buses.

### **Tackling the Climate Emergency Implications**

4.56 It is intended that the new electric buses will remove the most polluting diesel powered buses from use, with the better quality buses filtering down the fleet, which will be monitored quarterly.

4.57 Charging infrastructure will be introduced strategically to easily enable more electric buses to be added to the fleet.

4.58 The scheme aims to remove 50 tonnes of Nitrogen Oxides (NoX) a year and over 7,000 tonnes of carbon dioxide equivalent (CO<sub>2</sub>e) emissions per year from busy urban routes including some of the 36 recognised Air Quality Management Areas (AQMA's) in West Yorkshire, where nitrogen oxide exceeds statutory limits.

### **Inclusive Growth Implications**

4.59 The scheme inclusive growth implications include:

- The scheme focuses on routes with the lowest air quality, which also run through areas that are experiencing the highest levels of social and economic disadvantage. Poor air quality has a negative impact to the health of communities, which further contributes to social and economic inequality.
- The scheme will provide high specification electric buses to areas of highest economic need.

### **Equality and Diversity Implications**

4.60 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.

- 4.61 The specification of all the zero emission buses will improve facilities for all users and will include audio visual equipment in line with the Department for Transport's defined criteria.
- 4.62 Exact specifications vary between the three bus operators, but will include improvements to wheelchair provision, such as low floors and automatic ramps.

### **Consultation and Engagement**

- 4.63 Due to the nature of the scheme, which is to provide funding directly to bus operators to purchase electric buses and charging infrastructure, the promoters have not undertaken public consultation and engagement. The scheme has been developed in consultation with bus operators through the bus alliance.

### **Risks**

- 4.64 The scheme risks and mitigations include:
- Delay to the delivery of buses due to supply chain issues or lack of components for the buses, batteries or infrastructure to charge them.  
Mitigated by regular and close monitoring and dialogue between the Combined Authority and bus operators to identify issues as early as possible and give maximum time to solve problems or source alternatives.
  - Cost increases caused by significant inflation rises could impact budgets over the lifetime of the project, forcing a re-evaluation of how many buses can be purchased.  
Mitigated by the inclusion of contingency funding within the project and the impact of inflation will be closely monitored in collaboration with bus operators.

### **Costs**

#### ZEBRA project (Phase 1)

- 4.65 The Combined Authority at its meeting on 1 July 2022 gave full approval to total scheme costs of £56,161,738, of which £24,565,171 is from the Combined Authority's Zero Emission Bus Regional Area (ZEBRA) fund.
- 4.66 The Combined Authority, at its meeting on 27 July 2023, gave approval to a change request to increase the Combined Authority's funding by £5,744,069, bringing the total scheme costs to £69,978,646, of which £30,309,240 is from the Combined Authority's ZEBRA fund.
- 4.67 This change request is not requesting additional funding but reallocation of previously approved funding. The Combined Authority will enter into an addendum to the existing funding arrangement with the bus operators. The agreements and amounts are shown in exempt **Appendix 9**.

## ZEBRA 2

- 4.68 If ZEBRA 2 funding is awarded the total Combined Authority funding will be £36,505,365, of which £6,196,125 will be ZEBRA 2 funding.
- 4.69 The Combined Authority will enter into an addendum to the existing funding arrangement with the bus operators. The agreements and amounts are shown in exempt **Appendix 9**.

### **Future Assurance Pathway and Approval Route**

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Director of Transport Policy and Delivery	31/03/2026

### **Other Key Timescales – ZEBRA 2 funding**

- Funding announcement – expected March 2024
- Orders for ZEBs and Infrastructure placed – May 2024
- Design & contractor procurement commence – June 2024
- Infrastructure works commence – March 2025
- Infrastructure works complete – June 2025
- ZEB deliveries – October 2025
- Completion - all ZEBs in operation – March 2026

### **Assurance Tolerances**

- 4.70 The previous approvals and assurance tolerances set are outlined below:

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	FBC Approval by Transport Committee	Change Request Approval by Combined Authority	Request Change Request Approval	Within tolerance?
<b>Date</b>	23/06/22		01/07/22	27/07/23	14/04/24	
<b>Total Cost</b>	£81,161,738		£56,161,738	69,978,646	69,978,646	
<b>Combined Authority Funding</b>	10%	£49,565,171	£24,565,171	30,309,240	30,309,240	Y

Control area	Baseline Tolerance approved by the CA at DP2 SOC	Baseline Approval by the CA at DP2 - SOC	FBC Approval by Transport Committee	Change Request Approval by Combined Authority	Request Change Request Approval	Within tolerance?
Completion Date (DP5)	6 months	29/03/24	28/06/24	31/03/24	31/03/26	N
Outputs & Benefits	-10%	-	-	-	-	Y

4.71 The revised assurance tolerances for the recommended approval in this report are:

Assurance tolerances
<p>Combined Authority funding remain within those outlined in this report.</p> <p>Completion/service delivery date remains within +6 months of those outlined in this report.</p> <p>Outputs remain within -5% of those outlined in this report.</p>

### Appraisal Summary

- 4.72 The requested changes are well explained and suitable justification has been provided.
- 4.73 The change request can be seen to strengthen the strategic case as the decarbonisation and air quality benefits will be accrued across a wider area with more zero emission buses (ZEBs) being provided and other organisations making use of the new charging facilities.
- 4.74 The commercial case is unaffected as the partner bus operators already have procurement arrangements in place.
- 4.75 The economic case can be seen to be potentially positively affected if the ZEBRA2 funding bid is successful, as the additional outputs from the ZEBRA2 funding has a slightly higher benefit cost ratio (BCR) than the current scheme.
- 4.76 The financial case is similarly positive as the change request entails an increased amount of private sector match funding.
- 4.77 In the management case, slower than expected progress on the current scheme means that an extension of delivery timescale of 16 months (from 31 March 2024 to 31 July 2025) is needed. The reasons for this are well explained in the request and the time extension appears reasonable.
- 4.78 If the ZEBRA 2 funding bid is successful, this will extend the delivery timescale for that aspect to 31 January 2026.
- 4.79 It should be noted that changes to funding allocations between bus operators, and the extension of timescales changes detailed in this change request have

been formally approved by the Department for Transport (DfT) through their change control procedure.

4.80 The submission offers sufficient levels of assurance to recommend approval.

### **Recommendations**

4.81 The Combined Authority approves that:

- (i) The change request to for the scope changes and extension to project timescales to the ZEBRA project (Phase 1) as detailed in exempt Appendix 9.
- (ii) The change request to accept new funding from the second round of Zero Emission Bus Regional Area funding (ZEBRA 2), if awarded by the Department for Transport (DfT) and extend project delivery timescales as detailed in exempt Appendix 9.
- (iii) The Combined Authority enters into addendum to the existing funding agreements with the bus operators for the sums detailed in exempt Appendix 9.
- (iv) That a delegation to the Combined Authority's Chief Executive is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (v) Future approvals are made in accordance with the assurance pathway approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

<b>Project Title</b>	<b>Active Travel Fund Programme and Capability Fund Programme</b>
<b>Stage</b>	3 (delivery and evaluation)
<b>Decision Point</b>	Change request (activity 5)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.82 The Active Travel Fund (ATF) programme delivers improved and safe walking, wheeling, and cycling infrastructure across West Yorkshire. The Capability Fund programme provides behaviour change interventions across West Yorkshire at both a district and region-led level to encourage and enable cycling, wheeling and walking and also assists in developing a pipeline of schemes for future active travel funded works by carrying out appropriate feasibility studies.
- 4.83 Active Travel England (ATE) is the government's executive agency responsible for making walking, wheeling, and cycling the preferred choice for everyone to get around in England.
- 4.84 The Active Travel Fund 2 (ATF2) programme was approved by the West Yorkshire and York Investment Committee on 05 November 2020. The Active Travel Fund 3 (ATF3) programme was approved by the West Yorkshire Combined Authority on 22 October 2021, approving the delivery of the ATF3 programme. A change request for the ATF3 programme was approved by the West Yorkshire Transport Committee on 01 July 2022 to extend the programme end date from 31 March 2023 to 31 March 2024.
- 4.85 On 22 March 2023, Active Travel England awarded the Combined Authority £17,430,668 to deliver its Active Travel Fund Tranche 4 (ATF4) programme and Capability Fund programme across 2023/24.
- 4.86 A combined strategic outline case (SOC) for Active Travel Fund Tranche 4 and the Capability Fund was approved by the Transport Committee on 07 July 2023, in effect bringing all Active Travel tranches under one programme.
- 4.87 The ATF4 programme builds on the Emergency Active Travel Fund (EATF, announced on 23 May 2020) which installed temporary walking and cycling



projects to combat the impacts of the Covid19 pandemic, and subsequent tranches 2 and 3 for the delivery of longer term, permanent walking and cycling infrastructure. The Emergency Active Travel Fund has now been successfully delivered, with tranches 2, 3 & 4 currently in development and delivery.

- 4.88 The funding for ATF4 is to be committed by 31 March 2024 and delivered by 31 March 2025. ATE defined committed as a decision by the local authority to proceed with a scheme, e.g. when the scheme design and build activities are under contract or a business case for design and build is agreed by the executive.
- 4.89 The Capability Fund is a revenue fund awarded from central government through ATE and funds pipeline development of active travel schemes and behaviour change activity to encourage public use of and engagement with new and existing active travel infrastructure, activity including cycle and bike maintenance training and marketing campaigns.
- 4.90 The Capability Fund was originally due to be delivered by 31 December 2023. This timescale was challenging due to reduced timescales post award and competing pressures on capital programme delivery. A change control request was submitted to ATE in December 2023 to extend the timescales of the Capability Fund by 12 months to ensure high-quality delivery could be completed. The change control request was approved by ATE on 17 January 2024 allowing the delivery completion date to be extended to 31 December 2024.
- 4.91 The investment objectives of Active Travel England include:
- For 50% of short urban trips in England to be walked, wheeled, or cycled by 2030,
  - To increase active travel (walking, wheeling, cycling) from 41% in 2018 to 46% of short urban trips by 2025,
  - For 55% of primary aged school children walk to school by 2025.
  - Schemes which enable women and girls to feel safer and more confident in choosing active travel modes.

#### **Active Travel Fund Tranche 4 Extension (ATF4E)**

- 4.92 Further funding was announced by Active Travel England (ATE) on 15 August 2023, to enable the funding of schemes that were unsuccessful in the ATF4 funding bid. The Combined Authority and West Yorkshire district partners were invited to bid up to £3,082,319 of ATF4E funding.
- 4.93 Within the ATF4 bid process schemes were put forward into either the 'core' or 'competitive' bid. The 'core' bid had an indicative total for the Combined Authority, the 'competitive' bid was for schemes put into a nationally competitive evaluation process to determine whether their funding was successful. From the ATF4 bid the Combined Authority total of the 'core' bid that was unfunded was £3,082,319. This is the amount the Combine Authority has been invited to bid up to for ATF4E schemes.

4.94 However, it has now been confirmed by ATE that the funding for ATF4E schemes does not have to focus solely on unsuccessful ATF4 schemes as these may no longer be feasible or affordable.

4.95 The ATF4E programme will require schemes to be committed by 31 March 2025 and delivered by 31 March 2026.

### Active Travel Fund Programme Review

4.96 A number of changes are required in the various Active Travel Tranche programmes and for the Capability Fund programme. The additional ATF4E funding and Capability Fund Extension funding is also required to be added to the overall programme and the new schemes introduced, funding allocated, and assurance pathways set. The opportunity is therefore being taken to undertake a programme review and cover all the required changes in a single report.

### Active Travel Fund Tranche 2 Changes

4.97 The ATF2 programme has now run beyond the original funding period ending 31 March 2022. While most schemes have been delivered, the remaining schemes in development require changes to milestone dates and/or outputs to successfully deliver them. In some instances, this includes a re-allocation of funding from originally planned schemes to alternative schemes with similar outcomes for active travel. Details of the changes are provided below.

Table 1

Scheme	Change type	Original budget	Updated budget
Segregated cycle routes in South Bradford (Fenby Avenue), Bradford	Removal of scheme due to ongoing challenges and changing priorities.	£578,200	£62,100
Ivanhoe Road, Bradford	Removal of scheme due to delivery from alternative funding source.	£5,900	£0
Keighley Central Connectivity Scheme, Bradford	Add scheme (through re-allocation of funds) Completion of delivery extension to 31/12/24	£0	£235,000
Cottingley Mercure to Bingley Cycleway, Bradford	Increased budget. Scheme is complete but was over-budget due to rising construction costs.	£256,060	£466,060
Holme Wood Connectivity scheme, Bradford	Additional scheme to be part funded by ATF2. Completion of delivery extension to 31/03/25	£0	£77,000 (part funding)

Low Traffic Neighbourhoods, Bradford	Change in scope from delivering three LTN schemes to delivering the Saltaire LTN in full. Milestone extension to 31/12/24	£307,800	£307,800
Primrose Lane (Spen Valley Greenway), Kirklees	Completion of delivery extension to 31/12/24	£736,000	£736,000
HNC Accessibility Works, Kirklees	Completion of delivery extension to 31/06/24	£412,726	£412,726

4.98 All changes are also subject to ATE approval via their change control process.

### Active Travel Fund Tranche 3 Changes

4.99 Several ATF3 schemes require a change in milestone dates and/or outputs in order to successfully deliver the ATF3 programme. Details of the changes are provided below.

Table 2

Scheme	Change type	Scheme budget
Active Travel Neighbourhoods, Bradford	Change in scope to delivering three ATN schemes to delivering the Manningham connectivity scheme. Completion of delivery extension to 31/11/24.	£450,000
Darley Street, Bradford	Completion of delivery extension to 31/10/24.	£617,480
Active Travel Neighbourhoods, Calderdale	Change in scope to delivering three ATN schemes to delivering two community streets schemes (Moorfield and Ash Green). Completion of delivery extension to 30/09/24.	£475,000

### Active Travel Fund Tranche 4 Changes

4.100 Since SOC approval, the forecast milestones for a number of schemes have changed. The original milestones from ATE were for funds to be committed by 31 March 2024 and delivery completed by 31 March 2025. Any change to the milestones set by ATE require approval from ATE via their change control process.

4.101 Delays to milestones have been caused by further work needed on business case development, as this is the first time districts have taken active travel schemes through the Combined Authority's assurance process individually. Details of the changes to the completion of delivery date (decision point 5) are provided below.

Table 3

Scheme	Original DP5 completion of delivery date at programme SOC	Updated DP5 completion of delivery date
Grandstand Road Ph1 and Ph2	01/03/2025	31/06/2025
Ackworth to Fitzwilliam	01/03/2025	31/12/2025
Armley Town Street	01/03/2025	31/12/2025
Mini-Holland Phase 1	30/06/2024	31/06/2025
Access to Schools, Calderdale	27/06/2025	31/12/2025
Access to Hospitals	01/02/2025	31/12/2025
Access to Schools, Bradford	01/04/2025	31/12/2025
Huddersfield Narrow Canal	29/02/2024	31/06/2025
Huddersfield Broad Canal	29/02/2024	31/06/2025

4.102 There are planned minor changes to outputs for the following ATF4 scheme, which are subject to ATE approval:

- West Yorkshire School Streets Fund. - A reduction in the number of school streets delivered from 10 to 8; the addition of cycle and scooter parking infrastructure to support the sustainability and success of existing school streets.

4.103 Following further discussion and consideration of the requirements for business case submission and design assurance, additional development funding is required to complete Business Justification Case submission for the following ATF scheme:

- Grandstand Road Phase 1 - As work has progressed on this scheme it has become clear that further development funding was required to fully work up a scheme BJC. An increase in the development funding of £21,720, from £15,280 to a total of £37,000 is requested. This funding is from within the Grandstand Road Phase 1 project budget and is not an additional ask to the ATF4 programme budget.

### **Capability Fund Changes**

4.104 Since strategic outline case approval work has been undertaken to plan for and progress the delivery of the Capability Fund. This fund was originally to complete delivery by 31 December 2023.

4.105 The delivery timescales for this fund were challenging due to reduced timescales post award and competing pressures on capital programme

delivery. A change control was submitted to ATE to change the delivery completion date to 31 December 2024. This was approved by ATE on 17 January 2024. This will align delivery with the Capability Fund extension and ensure high quality work is delivered by giving districts the additional time needed to fully plan, procure, and deliver plans.

### **Active Travel Fund 4 Extension**

- 4.106 As mentioned in above the Combined Authority and West Yorkshire district partners were invited to bid up to £3,082,319 of ATF4E funding.
- 4.107 This report seeks approval to add the new ATF4E funding to the ATF4 programme. A decision by ATE on the ATF4E bid submitted by the Combined Authority and West Yorkshire district partners has not yet been announced.
- 4.108 Details of the six new schemes to be added to the ATF4 programme, and which are to be funded from the ATF4E funding, are provided in below:

Table 4

<b>Ref</b>	<b>Scheme</b>	<b>District</b>	<b>Indicative Budget</b>
A	Silsden - Kildwick Towpath	Bradford	£1,053,429.00
B	Baildon to Thackley	Bradford	£253,300.00
C	Broadstone Way (Holme Wood)	Bradford	£415,500.00
D	Pellon Routes to Schools	Calderdale	£631,470.00
E	Lydgate School Safety	Kirklees	£378,620.00
F	Footway Widening Package	Leeds	£350,000.00

- 4.109 It is requested that work commences on activity 5 (delivery), subject to an approval to proceed, for schemes B, C, E & F.
- 4.110 It is requested that work progresses on development of a Business Justification Case for schemes A and D, with £80,000 of development costs for scheme A and £102,495 for scheme D.

### **Capability Fund Extension**

- 4.111 The Capability Fund Extension is an £1,265,484 award to the Combined Authority and West Yorkshire partner councils. This was provided to the Combined Authority without the need for a bidding process. The purpose of this fund is to extend delivery of the Capability Fund programme of work, with the same outcomes of building capacity, developing networks, and promoting behaviour change. Activity will include extending existing interventions delivered by the Capability Fund, and delivering similar interventions within the same scope, e.g. bike training, LCWIP (Local Cycling and Walking Infrastructure Plans) development, bike maintenance upskilling, and community grant schemes.

- 4.112 The Capability Fund Extension will also assist in developing a pipeline of schemes for future Active Travel tranches by carrying out appropriate feasibility studies and evidence planning, as well as programme team costs to enable continued management of the Active Travel programme.
- 4.113 It will also undertake behaviour change interventions across West Yorkshire at both a district and region-led level, building on and expanding the Combined Authority's behaviour change activity to encourage and enable wider use of active travel modes.
- 4.114 It is therefore requested that the additional funding of £3,082,319 from the Active Travel Fund 4 Extension (subject to ATE approval) and additional funding of £1,265,484 from the Capability Fund Extension is added to the ATF4 programme. This will take the indicative approval of the Combined Authorities contribution from £19,961,635 to £24,309,438.

### Outputs and Outcomes

- 4.115 The scheme outputs include:

Previous Approval	Revised	Variance (+/-)
<p>16 Infrastructure Schemes delivering:</p> <ul style="list-style-type: none"> <li>• 1.52 miles of new segregated cycle infrastructure</li> <li>• 22 new junction treatments (to provide dedicated cycle facilities at junctions and improve cycle safety)</li> <li>• 0.28 miles of new permanent footways</li> <li>• 7.63 miles of new shared walking and cycling provision both on carriageway and off carriageway</li> <li>• 24.82 miles of road benefitting from improvements to make existing walking and cycling routes safer, including speed limit reduction (sign changes and reduced traffic flow)</li> <li>• 402 hectares benefitting from traffic management improvements including new permanent and temporary traffic regulation orders</li> </ul>	<p>22 Infrastructure Schemes delivering:</p> <ul style="list-style-type: none"> <li>• 1.52 miles of new segregated cycle infrastructure</li> <li>• 37 new junction treatments (to provide dedicated cycle facilities at junctions and improve cycle safety)</li> <li>• 0.42 miles of new permanent footways</li> <li>• 7.63 miles of new shared walking and cycling provision both on carriageway and off carriageway</li> <li>• 25.8 miles of road benefitting from improvements to make existing walking and cycling routes safer, including speed limit reduction (sign changes and reduced traffic flow)</li> <li>• 402 hectares benefitting from traffic management improvements including new permanent and temporary traffic regulation orders</li> </ul>	<p>Minor output changes to the ATF4 programme (subject to ATE approval)</p> <ul style="list-style-type: none"> <li>• 8 school streets</li> </ul> <p>6 new Infrastructure Schemes delivering:</p> <ul style="list-style-type: none"> <li>• 0.98 miles of improvements to make an existing walking/cycling route safer</li> <li>• 10 new road crossings</li> <li>• 15 junction treatments</li> <li>• 0.14 miles of new permanent footway</li> </ul>

<ul style="list-style-type: none"> <li>• 1.8 miles of bus priority measures that also enable active travel, e.g., bus gates</li> <li>• New cycle parking facilities in 12 locations</li> <li>• 25 new shared pedestrian and cycle road crossings</li> <li>• Improvements to streets around 16 schools to support safe walking, wheeling and cycling trips streets improvements</li> </ul>	<ul style="list-style-type: none"> <li>• 1.8 miles of bus priority measures that also enable active travel, e.g., bus gates</li> <li>• New cycle parking facilities in 12 locations</li> <li>• 25 new shared pedestrian and cycle road crossings</li> <li>• 10 new road crossings</li> <li>• Improvements to streets around 16 schools to support safe walking, wheeling and cycling trips streets improvements</li> <li>• 8 school streets</li> </ul>	
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4.116 The scheme outcomes are:

- Increase in walking trips.
- Increase in cycling trips.
- Increase in modal shift to walking and cycling from the car.
- Improved health and lower workplace absenteeism due to physical activity.

4.117 Further work on determining the forecast programme outcomes and project level outputs and benefits will be carried out through the respective ATF4 and ATF4E project business cases.

4.118 For ATF4 schemes with a capital cost estimate above £750,000, an indicative value for money (VfM) assessment was carried out. The assessment reflected Benefit Cost Ratio's (BCR) ranging from 1.61 to 9.52, classifying schemes as Medium to Very High VfM when assessed against the Department for Transport's value for money criteria.

4.119 An indicative VfM assessment has been carried out using the DfT's Active Mode Appraisal Tool (AMAT) for the new ATF4E schemes. The assessment reflects Benefit Cost Ratio's (BCR) ranging from 1.83 to 3.94, classifying schemes as Medium to High VfM when assessed against the DfT's value for money criteria.

4.120 A more robust appraisal will be carried out as part of individual project business cases, when a better understanding of all intended and unintended impacts will be understood.

### **Tackling the Climate Emergency Implications**

4.121 The ATF4 programme carried out a stage 1 qualitative Carbon Impact Assessment (CIA). The assessment records how the ATF4 schemes will support the various environmental and social categories. It has been

determined that this does not need updating as the scope of the programme is not changing.

- 4.122 The long-term impact of the schemes should positively contribute to transport greenhouse gas emissions by encouraging a reduction in private vehicles on roads, both directly and through linking with public transport interchanges (bus, rail). The re-allocating of road space, on some larger schemes, to walking and cycling presents an opportunity to design in green and blue infrastructure such as sustainable drainage, street trees and planting, supporting biodiversity (the natural ecosystem for plants and wildlife).
- 4.123 The Capability Fund Extension will contribute towards addressing the Climate Emergency through feasibility studies, data collection and learning that will support the development of a future pipeline of active travel schemes. These schemes will seek to support a reduction in carbon emissions from transport and improve the local air quality, whilst the behaviour change activities will complement this by raising awareness of access to cycling and enabling and encouraging additional cycling, wheeling, and walking trips.
- 4.124 A stage 2 quantitative Carbon Impact Assessment will be carried out as part of the development of each of the individual project business cases to determine whole life carbon impacts (construction and operational impacts). An exercise will also be undertaken to look at the programme-level carbon impact, which will inform the post scheme evaluation stage.

#### **Inclusive Growth Implications**

- 4.125 The ATF4E programme will improve links to the transport network across West Yorkshire, making it easier for more people to travel to work, education and training more sustainably and by more affordable means when compared to private car ownership. Additionally, by encouraging uptake of local trips by cycling and walking, it will reduce the pressure on owning and running a private vehicle.
- 4.126 Further detail on how each project at a local level will support the principles of inclusive growth will be provided through the individual project business cases.

#### **Equality and Diversity Implications**

- 4.127 The ATF4 programme has carried out an Equality Impact Assessment (EqIA), giving due consideration to the impact of the programme on protected groups.
- 4.128 The programme will deliver infrastructure that enables people of all ages (young and elderly) to undertake more journeys by cycling, wheeling, and walking especially for short, local trips, and to ensure provision of safe, segregated facilities that will benefit all users, especially those with a disability.
- 4.129 An EqIA for each of the respective projects will be carried out and submitted as part of the project business case submissions.



## Consultation and Engagement

4.130 Consultation and Engagement is managed by the West Yorkshire District Partners on a scheme by scheme basis. The Combined Authority programme team monitor when public consultation and engagement will take place and are available for support where required.

### Risks

4.131 The Active Travel Programme risks and mitigations are:

- Insufficient resources within delivery partners caused by increased workloads due to additional active travel funding streams.

The CA programme team look to mitigate this by ensuring work is not duplicated or abortive. The CA team also aim to forward plan information required from districts to allow for maximum response time. This remains as a very high risk as often information is required at short notice from ATE and the CA and district partners must work to the set deadlines to achieve further funding.

- That project costs increase above that estimated.

This has been mitigated by the programme building in allowance for inflation, risks, and contingency, and has an established Active Travel Board where it can take any additional funding requests to.

- Reallocation of road space and other active travel measures may increase opposition to schemes.

Opposition to such schemes can still be strong and has the potential impact of leading to a scheme being paused or cancelled, but measures taken by ATE to reduce road closures in current funding rounds has limited the impact of this. District partners have also learnt valuable lessons from previous tranches of ATF funding on consultation and engagement on active travel schemes.

- Funding deadlines missed through project delays, leading to funding being clawed back by ATE or DfT.

This is mitigated through regular updates between district partners and the CA programme team, where any potential slippage can be flagged early. ATE also now have a change control process in place that the programme has utilised where schemes will no longer meet set deadlines.

- Lack of political buy in due to insufficient engagement with ward members and ongoing political pressures.

This is mitigated through regular district partner engagement with the relevant ward members and portfolio holders to ensure schemes have the approval of political members.

4.132 The key Capability Fund Extension programme risk and mitigations are:

- Changes to policy relating to active travel.

This is mitigated through regular liaison with regional and district policy colleagues to ensure all work undertaken is consistent with any updated or emerging policies.

- Lack of public engagement, meaning the behaviour change activities are not successful.

This will be mitigated through expanding existing community engagement across the region, with community advocates shaping the way activity is delivered to ensure a high take up of the service offers.

## **Costs**

4.133 Additional capital funding of £3,082,319 from the Active Travel Fund 4 Extension and additional revenue funding of £1,265,484 from the Capability Fund Extension is to be added to the ATF4 programme, taking the indicative approval to the Combined Authorities contribution from £19,961,635 to £24,309,438.

4.134 The total scheme value is £24,309,438.

4.135 The Combined Authority's contribution is £24,309,438 from the Active Travel Fund Tranche 4, Capability Fund, Active Travel Fund Tranche 4 Extension and Capability Fund Extension.

4.136 The Active Travel Fund 4 Extension funding is still to be confirmed by ATE.

4.137 The capital funding of £3,082,319 from the Active Travel Fund 4 Extension will be provisionally allocated to the six schemes as detailed previously in this report.

4.138 The following ATF4E schemes will require the development costs set out below in order to develop Business Justification Cases, and funding agreements will need to be entered into the with respective partner councils.

- Silsden-Kildwick Towpath, Bradford - £80,000
- Pellon Routes to Schools, Calderdale - £102,495

4.139 Delivery of the Capability Fund Extension programme will cost £1,265,484. The indicative split of this funding for delivery of interventions are £759,290 for programme development and feasibility activities and £506,194 to deliver behaviour change initiatives. The Combined Authority's contribution is £1,265,484 from the Capability Fund Extension award.

4.140 The Combined Authority will need to enter into new grant funding agreements with each partner council for the following amounts from the revenue funding of £1,265,484 from the Capability Fund Extension.

- Kirklees Council up to £154,600.
- Calderdale Council up to £193,900.
- Wakefield Council up to £118,900.
- Bradford Council up to £118,400.

- Leeds City Council up to £278,900.

4.141 It is requested that an increase in the development funding by £21,720, from £15,280 to £37,000, is provided for the ATF4 Grandstand Road Phase 1 scheme. The Combined Authority will need to enter into an addendum to the existing funding agreement with Wakefield Council for expenditure of up to £37,000 from the Active Travel 4 fund.

### **Future Assurance Pathway and Approval Route**

4.142 Active Travel Fund 4 Programme:

Assurance pathway	Approval route	Forecast approval date
Change request (activity 2)	Recommendation: Combined Authority's Director of Transport Policy and Delivery (DoTPD) Decision: Transport Committee	14/03/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	31/12/2025

4.143 **New Active Travel Fund 4 Extension Schemes**

4.144 Silsden to Kildwick Towpath scheme, Bradford.

Assurance pathway	Approval route	Forecast approval date
2-4 (business justification case)	Recommendation: Combined Authority's Director of Transport Policy and Delivery (DoTPD) Decision: Combined Authority's Chief Executive (CE)	01/08/2024
5 (completion/service delivery)	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	30/04/2025

4.145 Baildon to Thackley scheme, Bradford.

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	01/04/2024

5 (completion/service delivery)	<p>Recommendation: Combined Authorities Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	31/03/2025
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#### 4.146 Broadstone Way, Holme Wood scheme, Bradford.

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	<p>Recommendation: Combined Authority's Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	01/04/2024
5 (completion/service delivery)	<p>Recommendation: Combined Authorities Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	31/03/2025

#### 4.147 Pellon Routes to Schools scheme, Calderdale.

Assurance pathway	Approval route	Forecast approval date
2-4 (business justification case)	<p>Recommendation: Combined Authority's Director of Transport Policy and Delivery (DoTPD)</p> <p>Decision: Combined Authority's Chief Executive (CE)</p>	20/12/2024
5 (completion/service delivery)	<p>Recommendation: Combined Authority's Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	30/09/2025

#### 4.148 Lydgate School Safety scheme, Kirklees.

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	<p>Recommendation: Combined Authority's Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	01/07/2024
5 (completion/service delivery)	<p>Recommendation: Combined Authority's Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)</p>	01/10/2024

#### 4.149 Leeds Footway Widening Package, Leeds.

Assurance pathway	Approval route	Forecast approval date
Approval to Proceed	Recommendation: Combined Authority's Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	01/01/2025
5 (completion/service delivery)	Recommendation: Combined Authorities Portfolio Investment Panel Decision: Combined Authority's Director of Transport, Policy and Delivery (DoTPD)	31/03/2025

#### Other Key Timescales

4.150 Changes to the Active Travel Fund 4 (ATF4) timescales as detailed previously in this report.

4.151 Key timescales for the Active Travel Fund 4 Extension (ATF4E) schemes.

Scheme	District	SoS Date	EoS Date
Silsden - Kildwick Towpath	Bradford	01/09/2024	30/04/2025
Baildon to Thackley	Bradford	01/05/2024	31/03/2025
Broadstone Way (Holme Wood)	Bradford	01/05/2024	31/03/2025
Pellon Routes to Schools	Calderdale	31/01/2025	30/09/2025
Lydgate School Safety	Kirklees	01/08/2024	01/10/2024
Footway Widening Package (LCC)	Leeds	01/02/2025	31/03/2025

#### Assurance Tolerances

Assurance tolerances for the Programme
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.
Assurance tolerances for projects progressing to activity 4 (BJC) or Approval to Proceed
Combined Authority funding remain within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

## **Appraisal Summary**

- 4.152 The changes to the ATF2, 3 and 4 projects, as well as the Capability Fund will allow the full delivery of the programme of works to be completed.
- 4.153 The addition of the ATF4E and Capability Fund extension funding will provide further support to local, regional, and national strategic objectives and policies, notably around sustainable transport, and clean growth and will further build on the previous tranches of funding and delivery.
- 4.154 The Capability Fund programme is already in delivery and the extension of this programme and the additional ATF4E funding, which will run concurrently with the ATF4 funding, will allow further development of schemes to be made and for the behaviour change element to make a greater impact.
- 4.155 It appears that the new ATF4E funding is to be allocated solely to the new ATF4E schemes and the Capability Fund extension and that there are no additional allocations for programme management, risk, contingency and benefits reporting other than that provided for in the existing ATF4 programme.
- 4.156 The highest rated risk relates to 'insufficient resources within the delivery partner'. This risk is very relevant due to the additional development and delivery activities that the partners will be expected to complete to meet the ATE timescales in addition to the existing ATF schemes.
- 4.157 There is an Active Travel Evaluation Framework (v. February 2023) in place and that the framework will be followed and demonstrated through the project business cases. Appraisal notes that the Framework needs to be updated to include the ATF4E and Capability Fund Extension.

## **Recommendations**

- 4.158 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:
- (i) Subject to Active Travel England approval, the changes to the Active Travel Fund 2 (ATF2), Active Travel Fund 3 (ATF3) and Active Travel Fund 4 (ATF4) projects in Tables 1, 2 and 3 of this report are approved.
  - (ii) The change request for the ATF4 Grandstand Road Phase 1 scheme to increase the development funding by £21,720, from £15,280 to £37,000, is approved and the Combined Authority enters into an addendum to the existing funding agreement with Wakefield Council for expenditure of up to £37,000 from the Active Travel 4 fund.
  - (iii) The change request for the ATF4 West Yorkshire School Streets scheme, to reduce the number of school streets from 10 to 8, is approved.
  - (iv) The change request for the Capability Fund to extend the DP5 completion of delivery date from December 2023 to December 2024 is approved (already been approved by ATE).

- (v) Additional funding of £3,082,319 from the Active Travel Fund 4 Extension and additional funding of £1,265,484 from the Capability Fund Extension is added to the ATF4 programme, taking the indicative approval to the Combined Authorities contribution from £19,961,635 to £24,309,438. The total scheme value is £24,309,438. (Active Travel Fund 4 Extension funding to be confirmed by ATE)
- (vi) Subject to confirmation of ATF4E funding by ATE, that the ATF4E funding of £3,082,319, funds the schemes in Table 4 and that work commences on activity 5 (Delivery) subject to an approval to proceed for schemes B, C, E & F. Grant funding agreements are to be entered into with the respective partner councils for the amounts in the Table 4 of this report for schemes B, C, E & F.
- (vii) Subject to confirmation of ATF4E funding by ATE, development costs of £80,000 are approved in order to progress scheme A in Table 4 to decision point 4 (via business justification case). A grant funding agreement is to be entered into with Bradford Council for £80,000.
- (viii) Subject to confirmation of ATF4E funding by ATE, development costs of £102,495 are approved in order to progress scheme D in Table 4 to decision point 4 (via business justification case). A grant funding agreement is to be entered into with Calderdale Council for £102,495.
- (ix) That the Capability Fund Extension funding of £1,265,484 is added to the Capability Fund Programme and that activity 5 (Delivery) continues.
- (x) The Combined Authority enters into new grant funding agreements with each partner council for the following amounts from the Capability Fund Extension:
- Kirklees Council up to £154,600
  - Calderdale Council up to £193,900
  - Wakefield Council up to £118,900
  - Bradford Council up to £118,400
  - Leeds City Council up to £278,900
- (xi) That a Delegation to the Director of Transport Policy and Delivery is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (xii) Future approvals are made in accordance with the assurance pathways and approval routes outlined in this report, subject to remaining within tolerances. Where further approval is required, the respective programme or schemes will return to the Transport Committee.

## **5 Tackling the Climate Emergency implications**

- 5.1 The Climate Emergency implications have been considered on all projects included in this report as part of their business case development.

## **6 Inclusive Growth implications**

- 6.1 The inclusive growth implications have been considered on all projects included in this report as part of their business case development.

## **7 Equality and Diversity implications**

- 7.1 Equality Impact Assessments (EqIA) have been undertaken on all projects included in this report as part of their business case development.

## **8 Financial implications**

- 8.1 The report seeks endorsement to expenditure from the available Combined Authority funding as set out in this report.

## **9 Legal implications**

- 9.1 The payment of funding to any recipient will be subject to a funding agreement being in place between the Combined Authority and the organisation in question.

- 9.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **10 Staffing implications**

- 10.1 A combination of Combined Authority and local partner council project, programme and portfolio management resources are or are in the process of being identified and costed for within the schemes in this report.

## **11 External consultees**

- 11.1 Where applicable scheme promoters have been consulted on the content of this report.

## **12 Recommendations (Summary)**

### **Transport Committee Delegation**

- 12.1 The Combined Authority approves that:
- (i) Where scheme approval is required before 20 June 2024, the schemes outlined in paragraph 3.16 are delegated for approval to the Transport Committee, due to expediency of delivery.

### **BCPC Kings Road Sustainable Transport Corridor**

- 12.2 The Combined Authority approves that:



- (i) The BCPC Kings Road Sustainable Transport Corridor scheme proceeds through strategic outline case (decision point 2) and work commences on outline business case (decision point 3).
- (ii) An indicative approval to the Combined Authority contribution of £34,999,161 is given. The total scheme value is £34,999,161.
- (iii) Development costs of £3,540,990 are approved in order to progress the scheme to outline business case (decision point 3) taking the total scheme approval to £3,790,990.
- (iv) The Combined Authority enters into an addendum to the existing funding agreement with Bradford Metropolitan District Council for expenditure of up to £3,790,990.
- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Bus Highway Hotspot Improvement Programme**

12.3 The Combined Authority approves:

- (i) Development costs of £252,000 are approved in order to progress the schemes to approval to proceed, taking the total scheme approvals to £592,000:
  - City of Bradford Metropolitan District Council: £232,000.
  - Wakefield Council: £20,000.
- (ii) The Combined Authority enters into an addendum to the existing funding agreements for expenditure as listed above.

12.4 The Combined Authority, approves that subject to the conditions set by the Portfolio Investment Panel that:

- (i) The Bus Highway Hotspot Improvement Programme proceeds through decision point 2 (strategic outline case) and work commences on decision point 5 (delivery) of individual schemes.
- (ii) Approval of £1,743,359, taking the total Combined Authority approval to £2,083,359 with indicative allocations for each scheme as below. The total scheme value is £2,083,359.
  - City of Bradford Metropolitan District Council: for expenditure of up to £1,287,004.
  - Leeds City Council: for expenditure of up to £350,899.
  - Wakefield Metropolitan District Council: for expenditure of up to £357,357.

- (iii) The Combined Authority enters into addendums to the existing funding agreements for expenditure as listed above.
- (iv) That a Delegation to the Director of Transport Policy and Delivery is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Huddersfield Rail Station Connections**

12.5 The Combined Authority approves that:

- (i) The Huddersfield Rail Station Connections scheme proceeds through decision point 3 (outline business case) and work commences on activity 4 (full business case).
- (ii) An indicative approval to the Combined Authority's contribution of £15,702,478 is given. The total scheme value is £18,702,478.
- (iii) Development costs of £924,000 are approved in order to progress the scheme to decision point 4 (full business case), taking the total scheme approval to £2,541,389.
- (iv) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £2,541,389.
- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Dewsbury- Batley- Chidswell Sustainable Travel Corridor**

12.6 The Combined Authority approves that:

- (i) The Dewsbury-Batley-Chidswell Sustainable Travel Corridor scheme proceeds through decision point 3 (outline business case) and work commences on activity 4 (full business case).
- (ii) An indicative approval is given to the Combined Authority's contribution of £9,992,299. The total scheme value is £9,992,299.
- (iii) Development costs of £926,000 are approved in order to progress the scheme to decision point 4 (full business case) taking the total scheme approval to £1,775,000.
- (iv) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £1,775,000.

- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Harrogate Rail Station Gateway Active Travel Improvement**

12.7 The Combined Authority approves that, subject to the successful outcome of the Department for Transport's Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:

- (i) The Harrogate Rail Station Gateway Active Travel Improvement scheme proceeds through decision point 4 (full business case) to activity 5 (Delivery).
- (ii) Additional development costs of £200,000 are approved in order to progress the scheme to approval to proceed, taking the total scheme development cost approvals to £2,296,553.
- (iii) Approval of the Combined Authority's contribution of £11,006,970 is given. The total scheme value is £12,056,970.
- (iv) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £11,006,970, subject to confirmation from the Department for Transport that funding for FY 24/25, 25/26 and 26/27 is available.
- (v) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Skipton Station Gateway**

12.8 The Combined Authority approves that, subject to the successful outcome of the Department for Transport's Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:

- (i) The Skipton Station Gateway scheme proceeds through decision point 4 (full business case) to activity 5 (Delivery).
- (ii) Approval of the Combined Authority's contribution of £6,971,771 for Phase 1 is given. The total scheme value for Phase 1 is £7,171,771. The total scheme value for Phase 1 and Phase 2 is £15,070,000.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £6,971,771, subject to confirmation from the Department for Transport that funding for FY 24/25, 25/26 and 26/27 is available.

- (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Selby Station Gateway**

12.9 The Combined Authority approves that, subject to the successful outcome of the Department for Transport's Stage Gate review for the project and change control process for the three North Yorkshire TCF schemes, and subject to the conditions set by the Portfolio Investment Panel, that:

- (i) The Selby Station Gateway scheme proceeds through decision point 4 (full business case) and work commences on activity 5 (delivery)
- (ii) Approval to increase the Combined Authority's contribution for phase 1 by £289,375, from £20,000,000 to £20,289,375 is given, with the additional contribution to be funded by reallocating £289,375 from the TCF Skipton scheme. The total scheme value for phase 1 is £25,375,508. The total scheme value for phase 1 and 2 is £32,535,508.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with North Yorkshire Council for expenditure up to £20,289,375, subject to confirmation from the Department for Transport that funding for Financial Years 2024/25 and 2025/26 is available.
- (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Kirklees Speed Limit Review**

12.10 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:

- (i) The Kirklees Speed Limit Review scheme proceeds through decision point 2 - 4 (business justification case) and work begins on activity 5 (delivery).
- (ii) Full approval to the Combined Authority contribution of £900,000, is given. The total scheme cost is £1,052,000.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with Kirklees Council for expenditure of up to £900,000.
- (iv) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **A58/A672 Corridor Improvement**

12.11 The Combined Authority approves that:

- (i) The change request for the A58/A672 Corridor Improvement scheme to increase the Combined Authority contribution by £1,333,769 from £5,442,000 to £6,775,769, to revise the scheme scope, and to extend the delivery completion date (decision point 5) from December 2023 to December 2024.
- (ii) The Combined Authority enters into an addendum to the existing funding agreement with Calderdale Council for expenditure up to £6,775,769.
- (iii) Future approvals are made in accordance with the assurance pathway, approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Zero Emission Bus Regional Area (ZEBRA)**

12.12 The Combined Authority approves that:

- (i) The change request to for the scope changes and extension to project timescales to the ZEBRA project (Phase 1) as detailed in exempt Appendix 9.
- (ii) The change request to accept new funding from the second round of Zero Emission Bus Regional Area funding (ZEBRA 2), if awarded by the Department for Transport (DfT) and extend project delivery timescales as detailed in exempt Appendix 9.
- (iii) The Combined Authority enters into addendum to the existing funding agreements with the bus operators for the sums detailed in exempt Appendix 9.
- (iv) That a delegation to the Combined Authority's Chief Executive is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (v) Future approvals are made in accordance with the assurance pathway approval route, and tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Transport Committee.

### **Active Travel Fund and Capability Fund**

12.13 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:

- (i) Subject to Active Travel England approval, the changes to the Active Travel Fund 2 (ATF2), Active Travel Fund 3 (ATF3) and Active Travel Fund 4 (ATF4) projects in Tables 1, 2 and 3 of this report are approved.
- (ii) The change request for the ATF4 Grandstand Road Phase 1 scheme to increase the development funding by £21,720, from £15,280 to £37,000, is approved and the Combined Authority enters into an addendum to the

existing funding agreement with Wakefield Council for expenditure of up to £37,000 from the Active Travel 4 fund.

- (iii) The change request for the ATF4 West Yorkshire School Streets scheme, to reduce the number of school streets from 10 to 8, is approved.
- (iv) The change request for the Capability Fund to extend the DP5 completion of delivery date from December 2023 to December 2024 is approved (already been approved by ATE).
- (v) Additional funding of £3,082,319 from the Active Travel Fund 4 Extension and additional funding of £1,265,484 from the Capability Fund Extension is added to the ATF4 programme, taking the indicative approval to the Combined Authorities contribution from £19,961,635 to £24,309,438. The total scheme value is £24,309,438. (Active Travel Fund 4 Extension funding to be confirmed by ATE)
- (vi) Subject to confirmation of ATF4E funding by ATE, that the ATF4E funding of £3,082,319, funds the schemes in Table 4 and that work commences on activity 5 (Delivery) subject to an approval to proceed for schemes B, C, E & F. Grant funding agreements are to be entered into with the respective partner councils for the amounts in the Table 4 of this report for schemes B, C, E & F.
- (vii) Subject to confirmation of ATF4E funding by ATE, development costs of £80,000 are approved in order to progress scheme A in Table 4 to decision point 4 (via business justification case). A grant funding agreement is to be entered into with Bradford Council for £80,000.
- (viii) Subject to confirmation of ATF4E funding by ATE, development costs of £102,495 are approved in order to progress scheme D in Table 4 to decision point 4 (via business justification case). A grant funding agreement is to be entered into with Calderdale Council for £102,495.
- (ix) That the Capability Fund Extension funding of £1,265,484 is added to the Capability Fund Programme and that activity 5 (Delivery) continues.
- (x) The Combined Authority enters into new grant funding agreements with each partner council for the following amounts from the Capability Fund Extension:
  - Kirklees Council up to £154,600
  - Calderdale Council up to £193,900
  - Wakefield Council up to £118,900
  - Bradford Council up to £118,400
  - Leeds City Council up to £278,900

- (xi) That a Delegation to the Director of Transport Policy and Delivery is approved to allow allocated funding amounts released as part of this decision to be amended as required and for grant funding agreements or addendums to grant funding agreements to be amended accordingly.
- (xii) Future approvals are made in accordance with the assurance pathways and approval routes outlined in this report, subject to remaining within tolerances. Where further approval is required, the respective programme or schemes will return to the Transport Committee.

### **13 Background Documents**

13.1 None as part of this report.

### **14 Appendices**

- Appendix 1 [BCPC Kings Road – Business Case Summary](#)
- Appendix 2 [Bus Highway Hotspot Improvements Programme \(BSHHIP\) – Business Case Summary](#)
- Appendix 3 [TCF Huddersfield Rail Station Connects – Business Case Summary](#)
- Appendix 4 [Dewsbury Batley Chidswell Sustainable Travel Corridor – Business Case Summary](#)
- Appendix 5 [Harrogate Rail Station Gateway – Business Case Summary](#)
- Appendix 6 [Skipton Railway Station Gateway – Business Case Summary](#)
- Appendix 7 [TCF Selby Station Gateway – Business Case Summary](#)
- Appendix 8 [CRSTS Kirklees Speed Limit Review – Business Case Summary](#)
- Appendix 9 Zero Emission Bus Regional Area (ZEBRA) – Financial Breakdown (**exempt appendix**)

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## Project Overview

Project Title	<b>BCPC Kings Road Sustainable Transport Corridor</b>
Main Funding Programme	City Region Sustainable Transport Settlement
Current Forecast Project cost	£34,999,161
Funding Applied for from the Combined Authority	£34,999,161

## Scheme Description

The Kings Road corridor is a key traffic route into Bradford city centre, which currently experiences high congestion, impacting bus service journey times and reliability. The current bus stop facilities also require improvement, as does the provision for pedestrians and cyclists.

The scheme will deliver a series of interventions to address transport challenges and encourage local trips to be made by bus, walking, or cycling. This will include new bus lanes and bus priority measures at junctions, improvements to bus stop waiting facilities such as shelters, seating, real time information and route finding. The scheme will also include new cycle lanes, improvements to pavements and new crossing points, as well as reducing the speed limit to improve safety and reduce risk of casualties.

## Business Case Summary

### Strategic Case

The Kings Road corridor is a key traffic route into Bradford city centre, and currently experiences high levels of congestion. This presents challenges to bus service journey times and reliability. The current bus stop facilities are also in need of improvement, as are the footpaths and pedestrian crossing points.

Improvements to infrastructure for cyclists and pedestrians will create a more accessible and safe environment for walking and cycling.

To address the challenges, several options have been considered with the preferred way forward including:

- New bus lanes and bus priority at junctions.
- Improvements to bus stop waiting facilities such as shelters, seating, real time information and route finding.
- New cycle lanes.

- Improvements to pavements and new crossing points.
- Reducing speed limits to provide a consistent speed limit along the corridor, and implementing corridor wide parking management measures.

The scheme will help deliver the Council’s emerging Local Plan and objectives of the CRSTS programme, as well as the West Yorkshire Mayoral pledge to tackle the climate emergency, as well as prioritising the Strategic Economic Framework including “Enabling Inclusive Growth”.

Engagement with several stakeholders has been carried out. Those involved include local schools, a bus operator, mobility planning groups, local councillors/ward members and local businesses – all through a mix of in-person and virtual meetings, as well as email communications. Feedback received has helped develop the preferred way forward proposal, with a full public consultation exercise to be carried out ahead of the outline business case submission.

#### Economic Case

The preferred way forward indicates a Benefit Cost Ratio of 1.01, categorising it as low value for money when assessed against the Department for Transport value for money criteria.

A more detailed appraisal of benefits, including mode shift and social and environmental impacts, will be carried out at the next decision point which should improve the BCR.

#### Commercial Case

The scheme is utilising a design and build contract.

#### Financial Case

The total scheme cost forecast is £34,999,161 and will be fully funded from the City Region Sustainable Transport Settlement (CRSTS) programme.

#### Management Case

Bradford Council is the lead promoter and has in place a project team, delivery partners, and governance arrangements including the Transport Infrastructure Delivery Board.

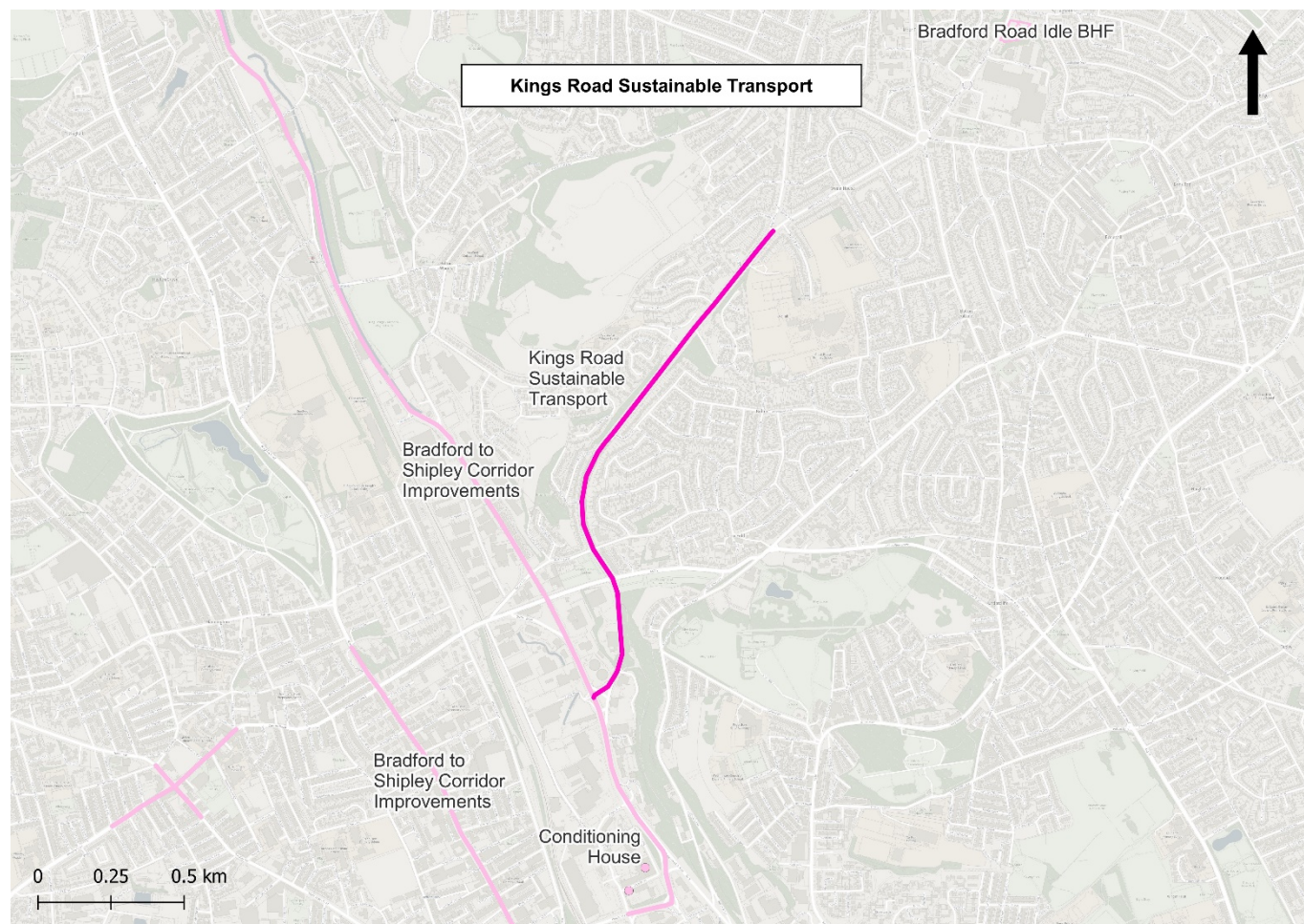
The delivery programme forecasts construction to commence in February 2026 with completion in March 2027.

New and amended Traffic Regulation Orders (TRO) will be needed with more detail to be known at outline business case stage.

Monitoring of scheme outputs and outcomes, such as impact of the scheme on walking trips, cycle trips, and bus use will be carried out in accordance with the CRSTS Evaluation Framework.

## Location Map

The following map shows the location of the Kings Road scheme



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

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## Project Overview

Project Title	Bus Highway Hotspot Improvements Programme (BHHIP)
Main Funding Programme	Levelling Up Fund 2 (LUF2)
Current Forecast Project cost	£2,083,359
Funding Applied for from the Combined Authority	£2,083,359
Other public sector funding amounts and sources	£2,051,000 LUF2 £32,359 CRSTS

## Scheme Description

The scheme will deliver bus priority improvements at ten key locations on the highway network in Bradford, Leeds and Wakefield, to improve journey time reliability for bus users and reduce congestion for other modes.

The programme is designed to help remove barriers to bus travel in West Yorkshire, improving connectivity and accessibility to opportunities to jobs, education and training, particularly for those living in low income communities with limited access to cars. This will help deliver inclusive growth and encourage modal shift towards public transport to contribute to the decarbonisation of the transport network.

## Business Case Summary

### Strategic Case

The scheme aims to provide bus network infrastructure enhancements to improve bus journey times and reliability. This aims to enhance the attractiveness and help increase the uptake of bus use, instead of the car, in order to decarbonise the transport network. It also aims to improve connectivity by bus for the transport network to be more inclusive and accessible to everyone.

The scheme will support objectives of the LUF2 programme, the West Yorkshire Mayor's pledge to tackle the climate emergency, and inclusive growth, 21st Century Transport, and Climate Emergency priorities of the Strategic Economic Framework (SEF) as well as other related strategies and policies at local, regional and national levels. The scheme will also complement the wider work currently underway to enhance bus travel in the region.



The scheme supports inclusive growth and inclusivity as it will improve opportunities to access employment, education, and housing, particularly for those without access to a car.

#### Economic Case

The value for money assessment indicated 'poor' value for money with a BCR of 0.6:1, when highway disbenefits of the schemes are included. This is predominantly due to a single scheme of strategic significance within the programme. The BCR without this scheme is 2.7:1, representing 'high' value for money.

When the benefits related to bus users are considered in isolation, the BCR is calculated as 3.6:1, representing 'high' value for money.

#### Commercial Case

The schemes are to be delivered by Bradford Metropolitan District Council, Leeds City Council and Wakefield City Council.

The design and development will primarily be done 'in-house' by the district partners and procurement for delivery of the scheme infrastructure will draw on existing supplier frameworks.

#### Financial Case

The total scheme/programme cost is estimated as £2,083,359.

A total of ££2,083,359 funding has been allocated to deliver the programme comprising £2,051,000 to come from the LUF2 fund and £32,359 of funding from the CRSTS fund, which was used for the initial stages of scheme and business case development.

#### Management Case

Bradford, Leeds and Wakefield Councils will manage the delivery of their respective schemes.

Governance structures are based on established arrangements and the scheme will report to the Combined Authority's CRSTS/LUF Operational Programme Board.

The scheme infrastructure is to be located on highway land and can be delivered within permitted development rights and Traffic Regulation Orders will be progressed as part of scheme delivery. A scheme risk register has been developed to monitor and manage risks.

## Project Overview

Project Title

**Huddersfield Rail Station Connections**

Main Funding Programme

Transforming Cities Fund (TCF)

Current Forecast Project cost

£18,702,478

Funding Applied for from the Combined Authority

£15,702,478

Other public sector funding amounts and sources

£3,000,000 (Kirklees Metropolitan Borough Council)

## Scheme Description

The scheme will deliver improvements to the walking, cycling and public transport infrastructure in Huddersfield Town Centre, to make it easier and safer for pedestrians, cyclists and public transport users to access the rail station and the rest of the town centre.

The scheme aims to deliver measurable improvements to journeys by public transport, walking and cycling into the rail station and access the town centre. It will improve safety for pedestrians and cyclists in the town centre and help to better connect low-income households in Huddersfield with employment, training and educational opportunities across the region.

## Business Case Summary

### Strategic Case

The Huddersfield Rail Station Connections scheme is multi-faceted with improvements to walking and cycling infrastructure and the public realm around Huddersfield Rail Station to:

- Support future rail demand through making the station more accessible by sustainable modes.
- Encourage mode-shift across Huddersfield.
- Improve accessibility across the town centre.

- Create more ‘people-focused’ spaces to support sustainable growth and investment.

The aim is to support the creation of a thriving, modern-day, family friendly town centre with better connected and more vibrant streets, as well as improving walking and cycling routes and public transport connections, as set out in the Huddersfield Blueprint agenda.

The scheme is concentrated in four areas, Northumberland Street, John William Street, St John’s Road, and Trinity Street.

The interventions include reduced traffic speed, reallocation of road space with wider pavements, shared and segregated cycle infrastructure, safer crossings, and space for urban realm enhancements such as tree planting and sustainable urban drainage.

The scheme is also designed to help prepare the area around Huddersfield Station for the TransPennine Route Upgrade. TRU delivers an investment in the railway running through Huddersfield to Manchester, Leeds and York, therefore improving connectivity and supporting economic growth in the north.

### Economic Case

The Benefit to Cost Ratio (BCR) of the Huddersfield Railway Station Connections scheme being 1.44. This represents “low” Value for Money (VfM) under the DfT Value for Money Framework. This is not uncommon in schemes which prioritise people walking and cycling.

The scheme will provide benefits for pedestrians, cyclists, and bus users, with the disbenefits to motorists. Should highway disbenefits be discounted, the BCR could potentially increase above 1.8, which would represent Medium value for money.

### Commercial Case

Kirklees Council will manage and be responsible for the procurement process to deliver this scheme, the emerging strategy will be finalised at Full Business Case. Development workshops have held between both Kirklees Council and the Combined Authority.

The preferred procurement route for the scheme will involve Early Contractor Involvement (ECI), as this approach encourages collaboration throughout the project, and helps design out construction risks early in the process. The ECI procurement is expected to start in April 2024.

The procurement strategy aims to maximise social value and ensure contractors are committed to delivering social value. Actions will be taken to ensure effective supply chain management, aligned with the Combined Authority’s strategic priorities around minimum employment standards, demonstrating innovation,



minimising embodied carbon impact and delivering the best transport-based outcomes will be taken.

#### Financial Case

The total project cost for the scheme is expected to be £18,657,770 and is funded through the Transforming Cities Fund.

#### Management Case

A full programme of key milestones has been developed with construction expected to complete at the end of April 2026. A risk register is in place and several headline risks have been identified and mitigation measures outlined to manage risks and minimise impact on scheme delivery.

The quality of the scheme design has been assessed through the Combined Authority's internal quality review process. At the time of OBC submission, each scheme element had been endorsed. Extensive engagement with a comprehensive list of stakeholders has been undertaken, and this has influenced the scheme design.

Further due diligence on the scheme will be undertaken as part of full business case development.

## Location Map

The following map shows the location of the TCF Huddersfield Rail Station Connections



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

## Project Overview

Project Title	<b>Dewsbury- Batley- Chidswell Sustainable Travel Corridor</b>
Main Funding Programme	Transforming Cities Fund
Current Forecast Project cost	£9,992,299
Funding Applied for from the Combined Authority	£9,992,299

## Scheme Description

The scheme is to provide new and upgraded cycle provision, pedestrian route improvements, junction upgrades and crossing facilities, primarily along the A652 corridor route linking Dewsbury to Batley Rail Station and onwards to Chidswell.

This aims to improve walking and cycling travel routes along the Dewsbury, Batley and Chidswell A652 corridor will encourage the uptake of trips to key employment, education, and housing sites by foot or bike. This will reduce car dependency, contribute to reducing carbon emissions and improve local air quality, which will help improve people's health and wellbeing.

## Business Case Summary

### Strategic Case

The scheme will deliver new and improved cycling and walking infrastructure (e.g. new cycles lanes and crossing points) to improve sustainable travel options, reduce congestion, and improve local air quality in the scheme area. The scheme supports delivery of the TCF programme objectives, such as boosting productivity through improved connections between urban centres and suburbs.

The enhancement of journey quality and safety for cycling and walking can improve access to opportunities in urban centres as well increasing town centre footfall and supporting economic growth. This will contribute to the aims of the Transforming Cities Fund as well as supporting the West Yorkshire Mayor's pledge to tackle the climate emergency, Investment Priority 5: 'Future Transport' of the West Yorkshire Investment Strategy, and principles of Inclusive Growth.

### Economic Case

The value for money assessment reflects a benefit cost ratio (BCR) of 0.5:1. This is categorised as poor value for money. The scheme was calculated to have relatively high benefits for pedestrians and cyclists however, the BCR result is due to the costs for the scheme and some disbenefits to highway users. The BCR

potentially represents a worst-case scenario and other benefits of the scheme, such as cumulative impacts and wider economic benefits, have not been quantified.

#### Commercial Case

The current preferred procurement route for scheme delivery is to appoint an external contractor on the Yorcvils3 Framework via a traditional procurement strategy.

The procurement route will be confirmed at full business case.

#### Financial Case

The latest cost estimate is £9,992,299 with the full amount to be funded by the Combined Authority's Transforming Cities Fund programme.

#### Management Case

Kirklees Council is responsible for the management and delivery of the scheme, with the overall delivery programme to be monitored and co-ordinated by the Kirklees TCF Programme Board.

Scheme risks will be managed via the project's quantified risk register.

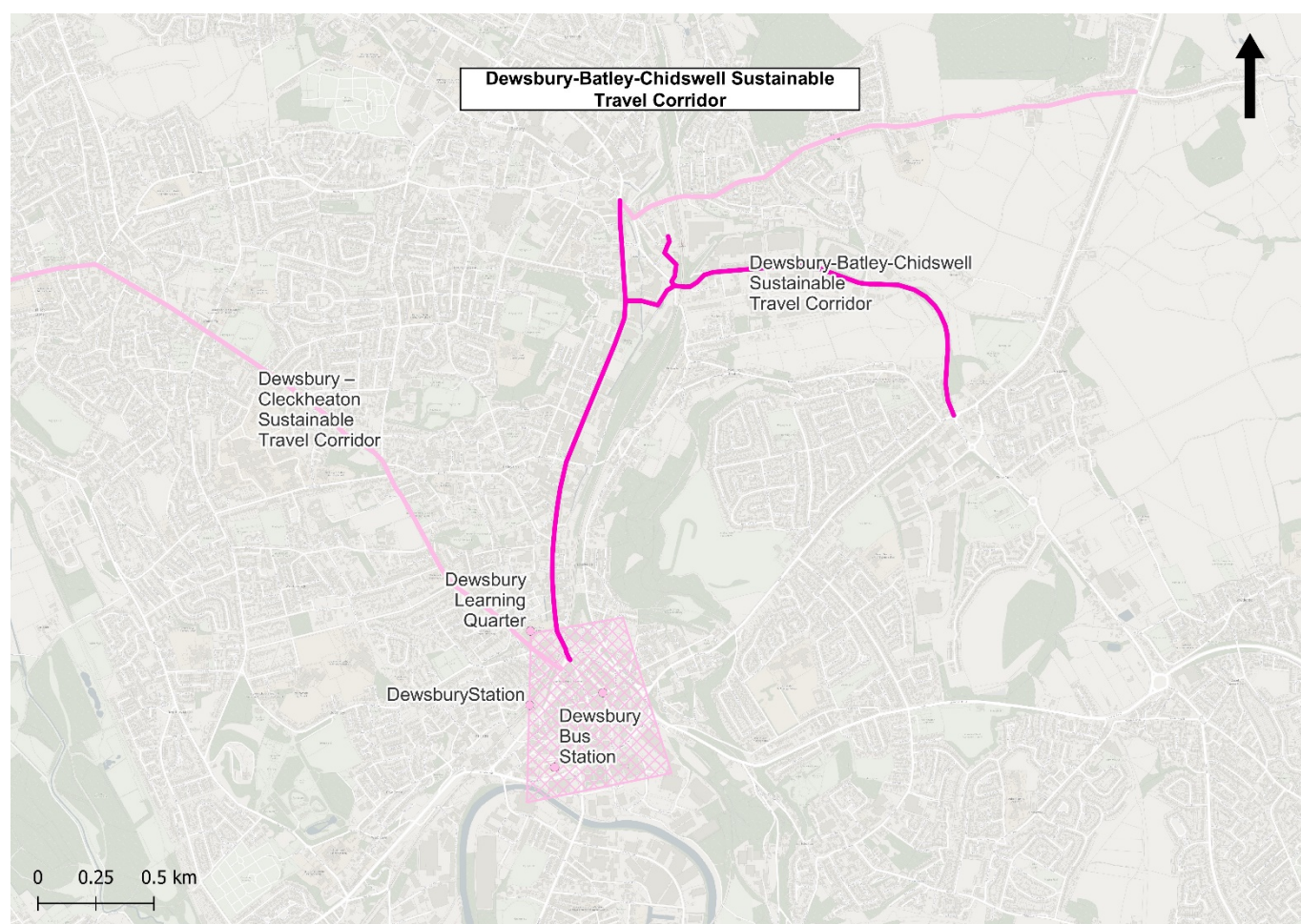
The promoter states there is no requirement for any land purchase and the proposed improvements fall under permitted development. Statutory processes for Traffic Regulation Orders will need to be followed as part of scheme delivery.

The current delivery programme forecasts construction to commence in April 2025 and the scheme to be completed in May 2026.



## Location Map

The following map shows the location of the Dewsbury Batley Chidswell Sustainable Travel Corridor:



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

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## Project Overview

Project Title	<b>TCF Harrogate Rail Station Gateway</b>
Main Funding Programme	Transforming Cities Fund
Current Forecast Project cost	£12,056,970
Funding Applied for from the Combined Authority	£11,006,970
Other public sector funding amounts and sources	£1,050,000 NYC Capital Match contribution

## Scheme Description

The scheme will deliver walking, cycling, and bus improvements in Harrogate town centre, principally along Station Parade up to the Station Bridge junction, adjacent to the Harrogate bus and rail stations.

The scheme will encourage more people to make local trips by walking, cycling, or the bus, instead of the car, easing congestion on the local highway network in Harrogate and contribute to reducing carbon emissions and improving local air quality.

Delivery of public realm improvements such as new paving at Station Square will improve the sense of place and arrival into Harrogate.

## Business Case Summary

### Strategic Case

The scheme will address transport challenges, such as high car dependency causing congestion on the local network in Harrogate. This will be achieved by delivering walking, cycling, and bus improvements to encourage local trips to be made by foot, bike, or bus instead of the car. This will include widened footways and new pedestrian crossing points, a new cycle lane and bus lane, a new cycle storage hub at the rail station, and improving the entrance and lighting at One Arch underpass. The scheme will also improve the paving at Station Square, making it a more attractive sense of arrival into Harrogate.

The scheme will support the Transforming Cities Fund programme objective of increasing walking, cycling and bus trips. This will help contribute to reducing carbon emissions and improving local air quality, as well as supporting delivery of the West Yorkshire Mayoral pledge of Tackling the Climate Emergency, and priorities of the Strategic Economic Framework such as Enabling Inclusive Growth.

### Economic Case

The value for money assessment calculates a benefit cost ratio of 0.8. This classes the scheme as poor Value for Money.

The poor BCR is largely because of increase in scheme costs combined with a reduced scope, with the scheme to mainly disbenefit highway users and retain modest walking, cycling, and bus benefits, in line with the funding objectives.

### Commercial Case

The contractor was appointed on an Early Contractor Involvement basis in November 2021, with a consultant appointed as the lead designer. The scheme awaits completion of the final design stage and development of the final cost before formally awarding the construction contract.

### Financial Case

North Yorkshire County Council will release £1,050,000 of Match funding to part fund the scheme. The remaining £11,006,970 will be funded from the Combined Authority's Transforming Cities Fund.

### Management Case

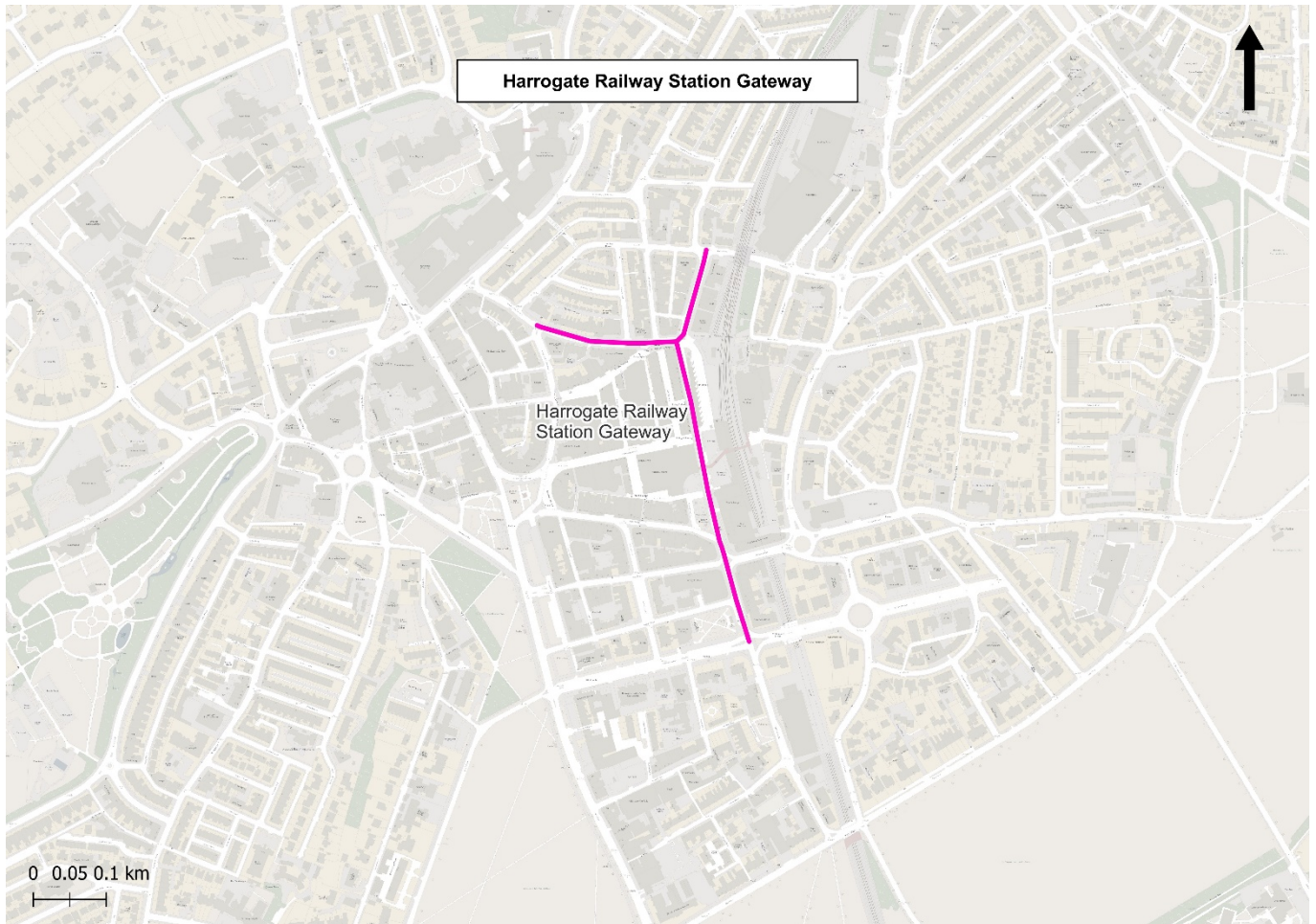
North Yorkshire Council is the lead promoter. Project delivery resources and project governance arrangements are in place. A scheme risk register has been developed to manage and monitor risks, with a Monitoring & Evaluation Plan in the process of being finalised to inform post scheme evaluation.

The scheme forecasts construction to commence in September 2024 and complete by September 2025. The delivery programme includes allowance for carrying out statutory consultation on Traffic Regulation Orders.



## Location Map

The following map shows the location of the TCF Harrogate Rail Station Gateway scheme



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

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## Project Overview

Project Title	<b>Skipton Railway Station Gateway – Active Travel Improvement Scheme</b>
Main Funding Programme	Transforming Cities Fund (TCF)
Current Forecast Project cost	£7,171,771 (Phase 1) £15,070,000 (Phase 1 & 2)
Funding Applied for from the Combined Authority	£6,971,771 (Phase 1)
Other public sector funding amounts and sources	£200,00 From North Yorkshire County Council (Phase 1)

## Scheme Description

The scheme aims to enhance the Skipton Railway Station forecourt and improve walking routes between the railway station, the bus station and Skipton town centre through the provision of improvements to the pedestrian facilities. The proposed interventions will transform Skipton Railway Station to a sustainable travel hub improving the connections between Skipton and the wider region, supporting inclusive and sustainable economic growth.

The Transforming Cities Fund will be utilised to fund phase 1 of this scheme, North Yorkshire Council are investigating potential funding sources for phase 2.

## Business Case Summary

### Strategic Case

The scheme consists of five complementary elements including public realm enhancements and accessibility improvements for the Skipton Railway Station Gateway area. Work will also include further enhancements of pedestrian facilities along the Auction Mart Canal footpath and provision of a high-quality walking corridor along Broughton Road and on the route linking the railway area with the bus station and replacement of the Gallows Bridge over the Leeds Liverpool Canal. Due to funding constraints, the delivery of the scheme is to be phased.

Phase 1 will utilise the TCF funding to deliver the canal footpath improvements, the railway station to bus station active travel improvements and replacement of the Gallows Bridge. North Yorkshire Council is actively seeking funding to deliver the phase 2 components.

The scheme is anticipated to have wider social benefits, promoting inclusive growth by improving accessibility to Skipton rail and bus stations, and consequently to employment and educational opportunities within Craven District and across the wider Leeds City Region.

The scheme puts a focus on people and placemaking to support and attract further inward investment into Skipton and working towards a Carbon-Zero Economy for the district and wider City Region through low carbon interventions in design and post scheme usage. The scheme will enhance accessibility for people with disabilities by improving surfaces, reducing obstacles and reducing conflicts with other road users.

#### Economic Case

The scheme's value for money assessment for Phase 1 reflects a benefit cost ratio (BCR) of 4.25:1 which represents 'very high' value for money. The benefit cost ratio (BCR) for both phases of the scheme is 3.03:1 which represents 'high' value for money.

#### Commercial Case

The contractor was appointed on an Early Contractor Involvement basis in November 2021, with a consultant appointed as the lead designer. The scheme awaits completion of the final design stage and development of the final cost before formally awarding the construction contract.

#### Financial Case

The total scheme costs for Phase 1 are £7,171,771. The total scheme costs for Phase 1 and Phase 2 are £15,070,000. For Phase 1, the Combined Authority's contribution is £6,971,771 from the Transforming Cities Fund and the remaining funding is £200,000 as match contribution from North Yorkshire Council. The scheme has made allowances for risk, inflation, and contingency costs.

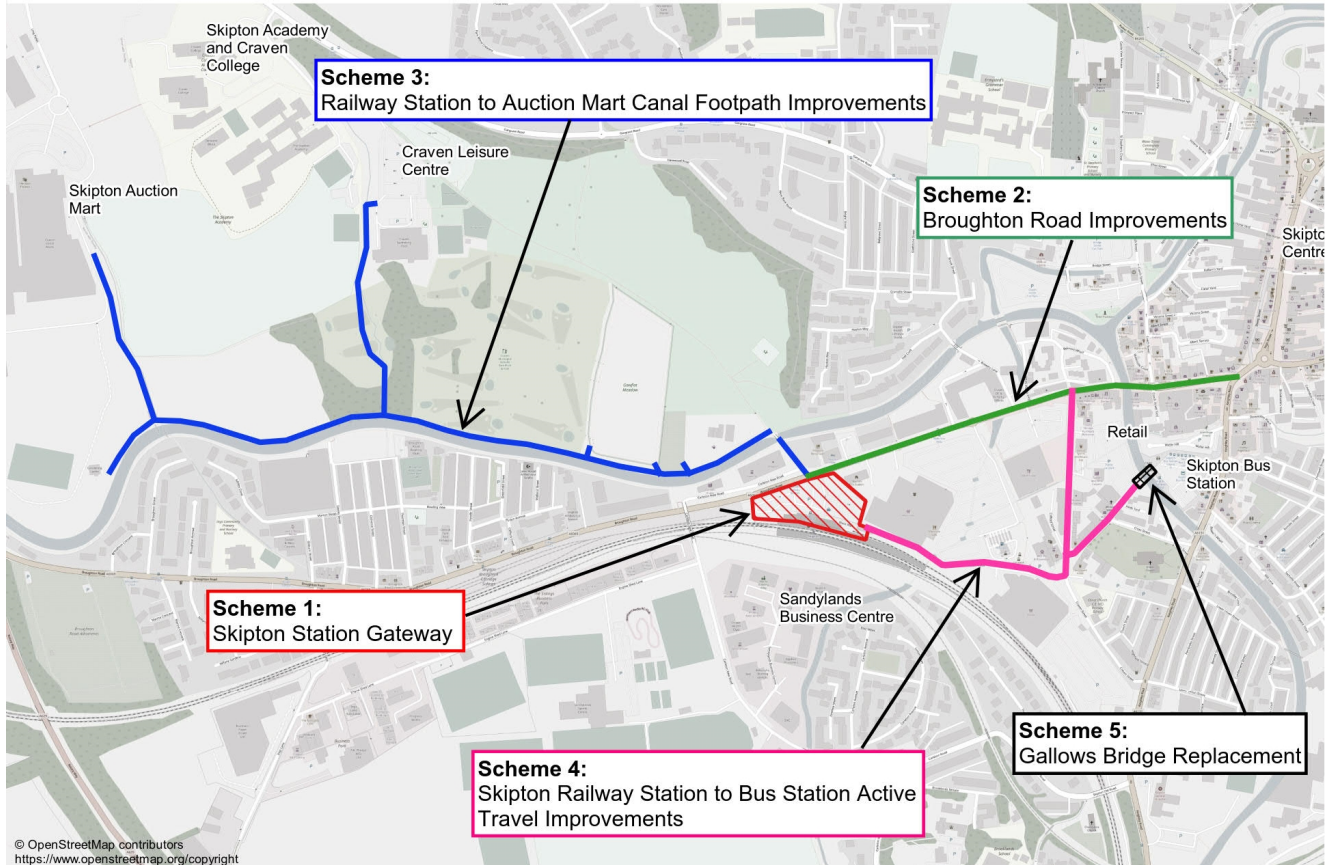
#### Management Case

North Yorkshire Council is the lead promoter. Project delivery resources and project governance arrangements are in place. A scheme risk register has been developed to manage and monitor risks, while a monitoring and evaluation plan is provided and will be updated as needed to inform post-scheme evaluation. The scheme forecasts construction to commence in September 2024 and complete by June 2025.



## Location Map

The following map shows the location of the components of the Skipton Station Gateway Active Travel Improvement Scheme.



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

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## Project Overview

Project Title	<b>TCF Selby Station Gateway</b>
Main Funding Programme	Transforming Cities Fund (TCF)
Current Forecast Project cost	£25,375,508
Funding Applied for from the Combined Authority	£20,289,375
Other public sector funding amounts and sources	£5,086,133 North Yorkshire Council Capital Funds

## Scheme Description

The scheme includes transformative measures focussed on Selby Rail Station and its surrounding area. It comprises Selby Station Gateway, Ousegate Active Travel Corridor, and eastern station access.

It includes a light touch refurbishment of the exterior of the station entrance as well as improvements to pedestrian and cycle accessibility.

The external refurbishment of the station and the accessibility improvements in the adjacent area are expected to increase footfall in the Station Gateway area and improve passenger satisfaction levels with the rail station. Accessibility improvements will be particularly beneficial for those with mobility impairments.

## Business Case Summary

### Strategic Case

The TCF Selby Station Gateway scheme meets the objectives and supports the vision of the Selby District Core Strategy Local Plan (2013) by providing a better and safer environment for cyclists, pedestrians and persons with reduced mobility. This enhances the facilities of Selby Rail Station and the Bus Hub and ensures new developments planned in Selby town are well-connected to Selby Station Gateway by walking and cycling providing equal access to opportunities for all.

The scheme will also enable the implementation of Selby's Local Cycling and Walking Infrastructure Plan (LCWIP), published in April 2020. By delivering enhanced cycling and pedestrian infrastructure along Ousegate and Shipyard Road, and closing Denison Bridge to traffic, the scheme has the potential to encourage more people to cycle through the Trans Pennine Trail and the National Cycle Network Routes 62 and 65. It could also stimulate a higher uptake of

walking and cycling along Denison Road that has been identified by LCWIP as a priority cycle and pedestrian route for Selby.

By enhancing access to Selby Station on foot and by cycle and improving the rail-bus interchange, the scheme will encourage a greater uptake of walking and cycling for local, short distance trips, while promoting bus and rail use for longer distance, cross-boundary trips. Given the proximity of Selby Station Gateway to a designated Air Quality Management Area, both improvement in local air quality and reduction in emissions are integral local objectives that the scheme will contribute towards, by taking car trips off the road network.

The scheme is also anticipated to have wider social benefits, contributing to inclusive growth by improving access to the Selby Station Gateway area, leading to employment and educational opportunities within the district and across the wider Leeds City Region.

#### Economic Case

The initial BCR for the Phase 1 Selby Station Gateway scheme is 0.31:1, which represents an initial Poor Value for Money position.

The Poor VfM rating is largely as a result of highway user disbenefits, such as increased journey times. When the highway impacts are removed, the value for money category is High.

#### Commercial Case

The contractor was appointed on an Early Contractor Involvement basis in November 2021, with a consultant appointed as the lead designer. The scheme awaits completion of the final design stage and development of the final cost before formally awarding the construction contract.

#### Financial Case

The scheme is now being delivered in two phases, with only phase 1 currently being affordable within the existing funding. The phase 1 scheme is funded from two sources:

- Transforming Cities Fund (TCF) - £20.289m (80%)
- NYC Capital Funds - £5.086m (20%)

Total scheme cost is £25.375m

#### Management Case

North Yorkshire Council is the lead promoter. Project delivery resources and project governance arrangements are in place. A scheme risk register has been developed to manage and monitor risks, with a Monitoring & Evaluation Plan in the process of being finalised to inform post scheme evaluation.

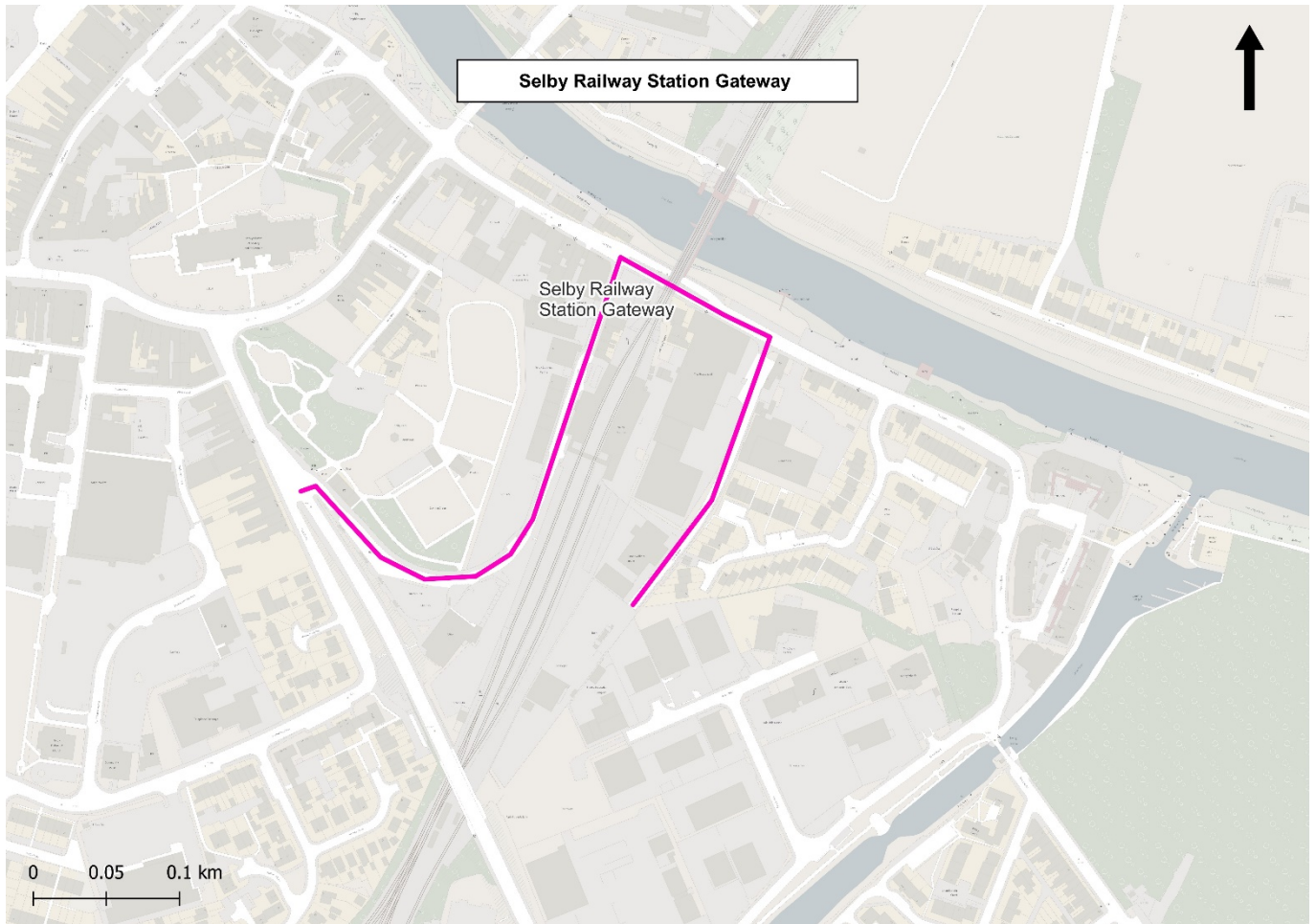


The scheme forecasts construction to be completed by October 2026. The delivery programme includes allowance for carrying out statutory consultation on Traffic Regulation Orders.



## Location Map

The following map shows the location of the components of the Selby Station Gateway Active Travel Improvement Scheme.



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

## Project Overview

Project Title	<b>CRSTS Kirklees Speed Limit Review</b>
Main Funding Programme	City Regional Sustainable Transport Settlement (CRSTS)
Current Forecast Project cost	£1,052,000
Funding Applied for from the Combined Authority	£900,000
Other public sector funding amounts and sources	£152,000 Kirklees Highways Safety Team budget

## Scheme Description

This scheme will improve road safety and develop improved facilities for walking and cycling school related trips within Kirklees. This will be delivered through a package of interventions which will include the review of existing 20mph speed limit zones, the production of school travel action plans as well as the replacement of missing or damaged speed limit signs and lines.

The scheme will improve speed limit compliance to improve road safety and will increase the number of children that are able to walk or cycle to school through the development and implementation of active travel action plans for targeted schools. The reduction of the number of journeys to and from school taken by car supports the reduction of carbon emissions and improved active travel connectivity to education sites.

## Business Case Summary

### Strategic Case

The scheme aims to provide highway safety enhancements through encouraging speed limit compliance and enabling speed limit enforcement, particularly in the vicinity of schools. This aims to reduce collision rates on the district highways and enhance the attractiveness of using active travel for school trips.

The principle of the scheme is in accordance with a number of policies and strategies of the Combined Authority, such as the SEF and WYIS, as well as the Mayor's Pledges, as it can help deliver inclusive growth, promote more sustainable forms of travel and reduce carbon emissions.

The scheme contributes to inclusive growth and inclusivity as it supports safer access to education, particularly for those travelling by active modes.

### Economic Case

The value for money assessment indicated low value for money with a BCR of 1.2:1.

This demonstrates that the scheme would have a net positive effect but is categorised as low value for money. The calculation, however, was only based on the speed reduction element of the scheme, due to its stage of development, and other potential road safety benefits could materialise.

### Commercial Case

The schemes are to be delivered and resource procured by Kirklees Council.

The design and development of the different elements of the package of schemes will be undertaken through a combination of means including 'in-house' through Kirklees Operational Services and procurement of signing works will be through Street Lighting and Signing Works Framework. Other elements will be through a minor works contract through the Surfacing and Planing contract.

### Financial Case

The total scheme/programme cost is estimated as £1,052,000.

A total of £1,052,000 funding has been allocated to deliver the programme comprising £900,000 from the CRSTS fund and £152,000 from Kirklees Council's Highways Safety Team budget.

### Management Case

Kirklees Council will manage the delivery of the scheme in compliance with the Kirklees Highways Framework.

Governance structures are based on established arrangements within Kirklees Council and the scheme will report to the Combined Authority's CRSTS Programme Board.

The scheme infrastructure is to be located on highway land and can be delivered within permitted development rights and Traffic Regulation Orders will be progressed as part of scheme delivery.

The scheme is expected to be delivered by March 2027

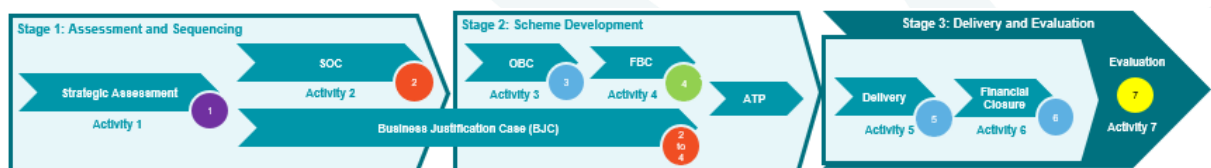
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<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Project Approvals - Investment Priority 6 – Creative Industries, Culture, Heritage and Sport</b>
<b>Director:</b>	Felix Kumi-Ampofo, Director Inclusive Economy, Skills & Culture
<b>Author:</b>	Craig Taylor, Head of Strategic Portfolio Office

## 1 Purpose of this report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 6 – Creative Industries, Culture, Heritage and Sport, within the West Yorkshire Investment Strategy (WYIS), that have been considered at stages 1, 2 and 3 of the Combined Authority’s assurance process.



- 1.2 The recommendations can be found in Section 12 of this report.

## 2 Report

- 2.1 This report presents proposals for the progression of schemes through the Combined Authority’s assurance process in line with the Combined Authority’s Assurance Framework. Further details on the schemes summarised below can be found as part of this report.

## 3 Investment Priority 6 (IP6) –Creative Industries, Culture, Heritage and Sport

- 3.1 The West Yorkshire Investment Strategy (WYIS) sets out the Investment Priorities for the period from 1 April 2021 to 31 March 2024 across six areas. In each, a number of priority project / programme areas have been identified that are the focus for intervention.

- 3.2 Investment Priority 6 will deliver a range of programmes and schemes which focus on:

- Embedding culture within all place-based work and place planning
- Culture being recognised and developed for its role in supporting the visitor economy.

- Cultural and creative businesses and their supply chains are developed and supported to maximise their potential.
- More people being actively engaged in cultural activity.
- Increase in employment in culture, sport and arts roles.
- Developing and promoting cultural activity that promotes clean growth and sustainability.

3.3 The Culture, Heritage and Sport Framework will deliver Investment Priority 6 through:

#### **Theme 1 People**

- Culture, heritage, and sport is threaded through the lives of people in West Yorkshire so that it is relevant, enjoyable and supports our sense of well-being. It is shaped, produced and participated in by all parts of our population.

#### **Theme 2 Place**

- We will invest in culture, heritage and sport activity and assets that tell the story of who we are.
- We will collaborate with anchor institutions, including universities and libraries, to increase cultural participation in our communities.

#### **Theme 3 Skills**

- We will invest in organisations and activities that offer training opportunities for staff, volunteers and participants.
- We will work with schools to promote possibilities and pathways for careers in the creative industries, heritage and sport sectors, and to recognise the value of transferable creative skills in the wider business sector.

#### **Theme 4 Business**

- Each major Year of Culture and/or City of Culture initiative grows audiences, creates jobs, and develops skills across the region, creating a sustainable cultural ecosystem.

#### **Evaluation**

3.4 The schemes, seeking approval via this report, have an Evaluation Plan in place. This has been devised in consultation with partners and both schemes have been issued with evaluation data requirements. The evaluation data requirements for these schemes are governed by the Combined Authority's Culture, Heritage and Sport Evaluation Framework and aligned to the Combined Authority's Evaluation Strategy, which in turn is based on the Magenta Book – which sets out central government's approach to evaluation. The Evaluation Strategy is a component of the Combined Authority's



Assurance Framework, which has recently been updated. Paragraphs 4.41 and 4.42 set out the outputs and outcomes expected from this programme.

### Publicity and Acknowledgement

- 3.5 The West Yorkshire Combined Authority logo, and the Tracy Brabin Mayor of West Yorkshire logo, will be used to acknowledge the support of the Combined Authority in all activities it funds or part-funds.
- 3.6 It is also a standard term of the Combined Authority grant contract that the recipient agrees to participate in and co-operate with reasonable promotional activities relating to the project, and each party shall comply with all reasonable requests from the other party to facilitate visits, provide reports, statistics, photographs and case studies that will assist the other party in its promotional and fundraising activities relating to the project.

### Scheme summaries

<p><b>West Yorkshire Tourism - LVEP</b> West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme will support establishment of a Local Visitor Economy Partnership (LVEP) with an aim to deliver a Destination Management Plan.</p> <p><b><u>Impact</u></b></p> <p>The West Yorkshire LVEP is a strategic collaboration between the five West Yorkshire districts and the Combined Authority, alongside partners in the visitor economy industry. Partners will work together to drive forward the management and growth of the local visitor economy.</p> <p>A formal benefit cost ratio assessment has not been undertaken as it is inappropriate for this scheme.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £500,000</p> <p>Total value of Combined Authority funding - £500,000</p> <p>Funding recommendation sought - £500,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Bradford 2025 UK City of Culture</b></p> <p>Bradford</p>	<p><b><u>Scheme description</u></b></p> <p>Bradford City of Culture 2025 was the successful bidder to be UK City of Culture in 2025. BD25 will be a yearlong programme of cultural events, festivals and celebrations bringing both local and global audiences to the West Yorkshire region.</p> <p>The scheme will be primarily funded via Gainshare IP6.</p> <p><b><u>Impact</u></b></p> <p>As well as cultural impacts, the year will provide significant economic growth to the region and surrounding areas whilst showcasing West Yorkshire's creative industries and heritage.</p> <p>The benefit cost ratio for the preferred way forward is calculated at 5.6:1. This represents very high value for money.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 4 (full business case) and work commences on activity 5 (delivery).</p> <p>Total value of the scheme - £ 42,407,000</p> <p>Total value of Combined Authority funding - £ 6,000,000</p> <p>Funding recommendation sought - £ 5,700,000 (development funding of £300,000 has previously been approved).</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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- 3.7 Since the Combined Authority's meeting on 1 February 2024, no decision points or change requests have been assessed in line with the Combined Authority's assurance process and approved through the agreed delegation to the Culture, Heritage and Sport Committee.

## **4 Information**

- 4.1 The Combined Authority's assurance framework requires that formal approval is given to the following elements of a scheme as part of its development:
- The progression of a scheme through a decision point to the next activity.
  - Indicative or full approval to the total value of the scheme funding requested.
  - The Combined Authority's entry into a funding agreement with the scheme's promoter.
  - The assurance pathway and approval route for future decision points.
  - The scheme's approval tolerances.
- 4.2 This report provides information required to enable the Combined Authority to approve each of the above elements.

### **Projects in Stage 1: Assessment and Sequencing**

- 4.3 There are no schemes to review at this stage.

### **Additional Approvals**

#### **British Library North**

- 4.4 The Combined Authority approved delegation of approvals for the British Library North scheme to the Culture, Heritage and Sport Committee on 29 July 2021. Due to the regeneration focus of the scheme, approval is sought revise the delegation to the Place Regeneration and Housing Committee for future approvals in relation to the British Library North scheme. The Combined Authority's Culture, Heritage and Sport Committee will focus on the cultural opportunity that the end use of the British Library North scheme provides to the region.
- 4.5 The Combined Authority approves that:
- (i) Future approvals in relation to the British Library North scheme are delegated to the Combined Authority's Place Regeneration and Housing Committee.

## Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>West Yorkshire Tourism - LVEP</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 to 4 (business justification)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

### Background

- 4.6 The West Yorkshire Local Visitor Economy Partnership (LVEP) is a strategic collaboration between the five West Yorkshire districts and the Combined Authority, working together to drive forward the management and growth of the local visitor economy. West Yorkshire LVEP status was established in July 2023 as a part of national network, launched by VisitEngland.
- 4.7 In 2019, West Yorkshire’s visitor economy generated £2.3bn of direct expenditure (Great Britain Tourism Survey, International Passenger Survey and Great Britain Day Visits Survey), with an overall contribution of nearly £5bn (Office for National Statistics). However, in recent years, the sector has seen enormous change and uncertainty, from factors including Covid-19, Brexit, the cost-of-living crisis, and inflation.
- 4.8 The scheme will support the establishment of a LVEP with an aim of delivering the Destination Management Plan, which consists of three areas of work:
- Priority 1: Increasing Awareness and Appeal.
    - This will involve market research into the motivation of visitors and potential visitors to develop and support campaigns to encourage an increase in visitors in West Yorkshire.
  - Priority 2: Develop Product and Places
    - This will commission a feasibility study to examine Visitor Pass Schemes and gather data in bed occupancy trends (i.e. hotels, B&B’s, etc).
  - Priority 3: Effectively Manage our Visitor Economy

- This will develop a commercial strategy for an application for Destination Development Partnership (DDP) status.

4.9 The LVEP Board has agreed that Leeds City Council will lead delivery of the LVEP and Destination Management Plan activities, recruiting a Programme Manager, and drawing on the wider expertise of the Visit Leeds team. The reasons for this are:

- Leeds Council are the lead applicant of the LVEP Agreement with VisitBritain
- Leeds Council have established in-house expertise in delivering tourism activities
- Of the 5 local authority's, Leeds Council are best resourced to support delivery of the activity.

4.10 The objectives are to:

- Increase awareness and appeal of West Yorkshire as a destination, driving up tourism and visitor spend, to benefit the economy and support jobs.
- Develop our product and places – across areas including events, transport and accommodation – to increase the appeal of West Yorkshire for a range of audiences, contributing to increased tourism to the region.
- Effectively manage our visitor economy by working in partnership with the public, private and third sectors, to support the growth of the tourism sector and businesses operating in the visitor economy.

4.11 This aligns with the following Mayoral priorities:

- Tackle the Climate Emergency and protect our environment.
- Support local businesses and be a champion for our local economy.
- Lead a Creative New Deal to ensure our creative industries are part of our broader recovery strategy.

4.12 A summary of the scheme's business case is included in **Appendix 1**.

### **Outputs and Outcomes**

4.13 Outputs and outcomes are split into three priority areas, as set out in the Destination Management Plan.

4.14 The scheme outputs include:

#### **Priority 1: Increase awareness and appeal**

- Commission market research with current and potential visitors to West Yorkshire, to understand the appeal and market for visits to West Yorkshire, awareness of the offer, likelihood to visit in future, motivations and barriers to visiting for different groups.

- The market research will be used to shape the development of two to three marketing campaigns covering the West Yorkshire footprint, targeting key groups identified through the research. Marketing campaigns are likely to utilise existing cultural assets, providing joined-up promotion of the regional offer.

### **Priority 2: Develop our product and places**

- Commission and publish a dedicated events strategy that collates and presents the regional events programme based on themes/content, and supports bids for major events to be held in West Yorkshire.
- Develop regional event campaigns that increase the number of people from across the region and beyond attending cultural and sporting events in West Yorkshire.
- Commission a feasibility study for a Visitor Pass in West Yorkshire, examining similar schemes elsewhere and assessing the options for a West Yorkshire Visitor Pass.

### **Priority 3: Effectively manage our visitor economy**

- Establish a sustainable governance structure and funding model for the LVEP beyond the 2-year period funded by the CA.
- Launch a dedicated website providing a central resource for promoting the region, sharing information about attractions and events, and providing a platform for advertising future schemes delivered by the LVEP.
- Investment in a regional dataset to provide insight on tourism and the visitor economy across the region. This includes data on number of visits to the region, types of visit, accommodation use and visitor spend. Data will be used to track change over time, providing insight into what's working well and areas for development.
- Supporting West Yorkshire visitor economy businesses to access and engage with existing Skills and Business Support provided by the CA, including the Growth Managers, ensuring the tourism sector can make the most of this offer.
- Sustainable, accessible and/or inclusive initiatives developed or supported.

4.15 The Scheme Outcomes include:

Short-term outcomes:

### **Priority 1: Increase awareness and appeal**

- Increased understanding of the market for visiting West Yorkshire, informing the development of targeted marketing strategies.
- Increased promotion and press coverage of West Yorkshire as a tourist destination.

- Increased awareness and appeal of West Yorkshire as a tourist destination for a range of audiences.

**Priority 2: Develop our product and places**

- Increased awareness and appeal of West Yorkshire as a cultural destination, nationally and internationally.

**Priority 3: Effectively manage our visitor economy**

- Improved partnership working and more effective cross-region collaboration.
- Sustainable funding model developed for the LVEP.
- Improved access to relevant data on sector trends, supporting informed decision-making and contributing to the evidence base.

4.16 Longer-term outcomes as the LVEP develops into future ‘delivery’ phases:

- Increased tourism to the region, including increased culture, heritage and sport tourism.
- Increased (and longer) overnight stays, and increased visitor spend, to benefit the economy and support jobs.
- Increased business growth and sustainability in the tourism sector (including start-ups and SMEs).
- Improved image and profile of West Yorkshire as a place to visit, move to, invest in and study.

4.17 Due to the nature of the scheme, a benefit cost ratio has not been calculated. Value for money is established through the wider benefits the creation of the LVEP produces.

**Tackling the Climate Emergency Implications**

4.18 The scheme tackling climate emergency implications are:

- The LVEP will be tasked with making the CA’s approach to the visitor economy as low-carbon as possible. This includes:
  - Measuring and reducing the carbon footprint of tourism activities, such as transport, accommodation, food, etc., by using low-carbon technologies, renewable energy sources and offsetting schemes.
  - Increasing low carbon and sustainable food production and consumption. This includes supporting local food producers and retailers, reducing food waste and packaging, promoting healthy diets, and addressing food poverty.
  - Raising awareness and education among tourists and tourism providers about the impacts of climate change on natural and cultural heritage and promoting responsible and sustainable tourism practices.
- The LVEP will also encourage visitors to walk, cycle and provide information on sustainable public transport options. Incentives will also

be explored for visitors who choose to use electric vehicles or car-sharing schemes.

- 4.19 A Stage 1 Carbon Impact Assessment has been undertaken as part of the business case submission process and indicated alignment with the West Yorkshire Combined Authority's zero carbon aspirations. There is an appreciation that if the scheme was to succeed in its intentions there would be a small increase in carbon due to the increased footfall within West Yorkshire, work is planned within the scheme to minimise any potential impact.

### **Inclusive Growth Implications**

- 4.20 The scheme inclusive growth implications include:
- The scheme will work with local education providers, employers, and stakeholders to identify and address the skills gaps and needs in the tourism sector and provide training and support for existing and potential workers.
  - The programme aims to boost employment levels in the visitor economy across West Yorkshire, by driving visitor numbers and spend (through marketing campaigns), identifying skills gaps, and (with CA Skills colleagues) procuring training to meet these gaps. It will address the under-representation of minoritised groups by generating insights into the diversity of the sector, and into the barriers that prevent career progression within the sector.
  - By enhancing employment opportunities and career pathways, the project will also increase income levels across the region, improving the living standards and well-being of the residents.

### **Equality and Diversity Implications**

- 4.21 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.
- 4.22 The scheme equality and diversity priorities are:
- Ensure a diverse talent pool and increase social mobility across the visitor economy.
  - Reduce barriers to accessing education, training, and employment in the sector for those from underrepresented groups.
  - Work with visitor economy businesses and assets to ensure their offer is accessible to visitors with additional needs.
  - Ensure alignment to wider CA Inclusive Growth goals.

### **Consultation and Engagement**

- 4.23 Due to the nature of the scheme, full public consultation has not been undertaken. The engagement of stakeholders has been channelled through the membership of the LVEP where local authorities, private sector and 3<sup>rd</sup>



Sector members have been engaged. These key stakeholders have also been closely involved in the development of this scheme.

- 4.24 The wider public will be engaged by public-facing campaigns through the Destination Management Plan activities and promotions of the region's visitor attractions and cultural events with local authorities collaborating on cross-promotion and social media takeovers.

### **Risks**

- 4.25 The scheme risks and mitigations are:

- Lack of West Yorkshire Combined Authority internal capacity to support the LVEP and work with VisitEngland and other partners. This is mitigated by working closely with the senior responsible officer and Leeds City Council to progress recruitment as soon as possible.
- Timescales for LVEP delivery and possible draw down of funding do not align, which may cause delays or gaps in the implementation of the Destination Management Plan. This is mitigated by the senior responsible officer and programme manager working with partner organisations to ensure regular delivery updates are tracked.
- There is no certainty that income streams will be acquired after the initially sought two-year funding period, to make the West Yorkshire LVEP self-sustaining (whether through private sector contribution, or VisitEngland DPP accreditation and funding). This will be mitigated by regular budget updates to senior responsible officer, regular updates on private sector match funding, and progression towards VisitEngland DPP accreditation and funding.
- Budgetary pressures on local authorities may lead to reduced engagement and/or funding for local tourism activities, and/or investment in culture, heritage and sport activities. This will be mitigated by programme manager's engagement with local authorities, ensuring buy-in, and identifying possible challenges earlier, however the scheme is already supported by high level political buy-in.

### **Costs**

- 4.26 The total scheme costs are £500,000.
- 4.27 The Combined Authority's contribution is £500,000 from the Single Investment Fund.
- 4.28 The Combined Authority will need to enter into a funding agreement with Leeds City Council for expenditure of up to £470,000 from the Investment Priority 6 Gainshare Fund.
- 4.29 The remaining £30,000 will be retained by the Combined Authority to procure and undertake Monitoring and Evaluation arrangements.

## Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	<p>Recommendation: Combined Authority's Portfolio Investment Panel</p> <p>Decision: Combined Authority's Director of Inclusive Economy, Skills &amp; Culture (DoIESC)</p>	01/04/2026

### Other Key Timescales

- Start of delivery 01/04/2024
- Completion date 30/04/2026

### Assurance Tolerances

- 4.30 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
<p>Combined Authority funding remains within +10% of those outlined in this report.</p> <p>Completion/service delivery date remains within +6 months of those outlined in this report.</p> <p>Outputs remain within -10% of those outlined in this report.</p>

### Appraisal Summary

- 4.31 The scheme demonstrates alignment with local, regional and national policies and priorities, as well as alignment to Mayoral pledges, CA priorities and wider local and national government priorities.
- 4.32 The scheme has a strong potential to increase the number of visitors to the West Yorkshire and boost employment levels in visitor economy. Ongoing consideration to mitigation of carbon impact and inclusive growth will be required throughout the implementation stage.
- 4.33 It is expected that the scheme will have positive impact to setting up structures that will increase awareness of the region, develop products and places and effectively manage visitor economy of the West Yorkshire.

### Recommendations

- 4.34 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:
- (i) The West Yorkshire Tourism - LVEP scheme proceeds through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).

- (ii) Approval to the Combined Authority's contribution of £500,000 is given. The total scheme value is £500,000.
- (iii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £470,000.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Culture, Heritage and Sport Committee.

<b>Project Title</b>	<b>Bradford 2025 UK City of Culture</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	3 (outline business case) and 4 (full business case)

Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:		
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

## Background

- 4.35 The UK City of Culture designation is given through a national competition every four years administered by the Department for Culture, Media and Sport. Bradford was successful in their bid and won the 2025 designation on 31 May 2022 and will be known as Bradford UK City of Culture 2025 or BD25.
- 4.36 BD25 will be a year-long programme of events and celebrations and will bring unprecedented media attention, as well as local and global audiences to the West Yorkshire region. Events, festivals and performances will be held and will take place over a multitude of venues with further details of programming to follow once confirmation of funding is in place.
- 4.37 The objectives of the scheme are:
- By 2026, culture will be more available and more accessible across the district; measured via household survey and Age of Wonder (part of Born in Bradford) surveys.
  - As a result of Bradford 2025, Bradford's cultural sector will be more dynamic and confident and growing a new young generation of leaders and changemakers; tracked over a number of years via cultural sector surveys, stakeholder engagement and qualifications, training and employment data.
  - As a result of Bradford 2025, the cultural and creative sector will be bigger, more agile and contributes to the economic success and sustainability of the district; measured via phased economic impact and social value assessment.
  - As a result of Bradford 2025, the district will have a strong identity as an attractive, thriving and unique cultural destination; measured via

phased economic impact and social value assessment, visitor experience data and media sentiment analysis.

- 4.38 The scheme aligns strongly to the Strategic Economic Framework (SEF) including alignment to IP1 Good Jobs and Resilient Businesses, IP2 Skills and Training for People, IP3 Creating Great Places and Accelerating Infrastructure and IP4 Tackling the climate Emergency.
- 4.39 The scheme aligns to the Mayor's pledges, specifically pledge 5 (Lead a Creative New Deal to ensure our creative industries are part of our broader recovery strategy) however the scheme also has alignment to mayoral pledges 1 (Create 1,000 well paid, skilled, green jobs for young people), 2 (Tackle the Climate Emergency and protect our environment), 3 (Prioritise skills and training to ensure everyone has the skills they need to secure work) and 4 (Support local businesses and be a champion for our local economy).
- 4.40 A summary of the scheme's business case is included in **Appendix 2**.

### **Outputs and Outcomes**

- 4.41 The scheme outputs for the preferred way forward include:
- 1000 performances and events by the end of 2025.
  - 200 Artist commissions by the end of 2025.
  - 100 community led arts projects by the end of 2025.
  - 24 festivals by the end of 2025.
  - 15 major national and international collaborations by the end of 2025.
  - 480,100 (90%) residents engaged in BD25 by the end of 2025.
  - 60,000 participants involved in activities by the end of 2025.
  - 3,780 volunteers involved in the scheme by the end of 2025.
  - 3,000,000 additional visitors to the district by the end of 2025.
  - £367,000,000 added GVA in 2025.
  - £654,000,000 visitor spend by the end of 2025.
  - 507 new cultural and creative industry jobs created by the end of 2025.
  - 1,620 new visitor economy jobs by the end of 2025.
  - £290,000,000 of social value by the end of 2025.
- 4.42 The scheme outcomes are:
- A shared understanding of what culture and creativity mean to people in Bradford.
  - Reducing barriers to cultural participation and ensure everyone has the opportunity to make and experience art.
  - Establish volunteering as a strong progression route to training and employment in Bradford.

- Increased number and diversity of qualifications taken/gained.
- Apprentices and trainees secure long-term work within Bradford's cultural sector.
- Increased number of cultural/creative employees and SME's, start-ups, and re-locations into the district.
- Increased number of direct and indirect jobs in the creative sector and visitor economy.
- Increased cultural investment per capita.
- Increased GVA.
- Improved self-reported community connectedness, pride in place, happiness and life satisfaction.
- Improved awareness of environmental sustainability and new models for collecting data and evidencing the direct and indirect environmental impacts of cultural events and activities.
- Accessible and active networks of cultural sector employees and artists.

### **Tackling the Climate Emergency Implications**

4.43 The scheme has a sustainability framework that aligns to the United Nations Sustainable Development Goals (SDGs) and seeks to promote environmentally regenerative and clean growth, fostering inclusive economic development and a thriving community that benefits all.

4.44 The scheme will:

- Engage a sustainability partner to provide training, advice and resources to cultural organisations and businesses about sustainable energy.
- Utilise low carbon technologies for mobile power generation.
- Promote public transport to and from events. Raise awareness of potential impacts of climate change and its impact on the local community through the public programme.
- Utilise green spaces (such as parks and public gardens) as event spaces and venues to promote engagement with nature, while ensuring minimal environmental impact.

### **Inclusive Growth Implications**

4.45 The scheme inclusive growth implications include:

- Provide opportunities of engagement/experience for those who may not have access or see cultural activities as not for the e.g. Those living in poverty/deprivation/economically disadvantaged, carers/young carers etc.

### **Equality and Diversity Implications**

- 4.46 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts taken account of as part of the development of the scheme and the business case development.
- 4.47 No negative Equality and Diversity implications have been identified.

### **Consultation and Engagement**

- 4.48 The 'preferred option' to bid for UK City of Culture 2025 was developed through extensive consultation with more than 7,000 people at 180 events. This was tested through board and community steering group workshops throughout 2021/22 and at full council meetings resulting in unanimous and cross-party support. The bid had written support from the Mayor, the Combined Authority and the other remaining West Yorkshire local authorities.

### **Risks**

- 4.49 The scheme risks and mitigations are:
- Public funding risks – rejection or reduction of any public funding bids or offers or the timing of decisions impacting the creative programme. Mitigations for this risk include ensuring Memorandum of Understandings and licenses are signed, having regular meetings with the Chief Executive Officer and senior team at Bradford Council and payment schedules in place.
  - Loss of public support – Loss of community support in the wider district, hampering delivery and producing negative PR. Mitigations for this risk include strong high profile sustained activities with deeply rooted district-wide support, regular presence on social media and with interest groups, community engagement across the district and a pro-active press campaign.
  - District readiness – the district is not ready for Bradford 2025 due to CBMDBC financial situation or possible TCF work running late. Mitigations for this risk include strong public commitment from political and senior leadership, the appointment of a District Readiness Team to work closely with BD25 team, regular briefing sessions for Council Members, BD Senior Staff attend District Readiness Board Meetings and a Council Members Reference Group established.

### **Costs**

- 4.50 The total scheme costs are £42,407,000.
- 4.51 The Combined Authority's contribution is £6,000,000 from the Single Investment Fund.
- 4.52 Total Revenue funding of £24,100,000 is confirmed from:
- City of Bradford Metropolitan District Borough Council

- Department for Culture Media and Sport
- Arts Council England
- National Lottery Heritage Fund

Further applications are under consideration totalling £12,307,000 from:

- BD25 Sponsors and Trusts
- National Lottery Community Fund

4.53 The Combined Authority will need to enter into a funding agreement with Bradford Culture Company Ltd for expenditure of up to £5,700,000.

4.54 £300,000 development funding was already approved at decision point 1 (strategic assessment).

### Future Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
5 (completion/service delivery)	Recommendation: Combined Authority's Programme Appraisal Team  Decision: Combined Authority's Director of Inclusive Economy, Skills & Culture (DoIESC)	31/03/2026

### Other Key Timescales

- Opening of the year of culture: 1<sup>st</sup> January 2025

### Assurance Tolerances

4.55 This approval is the first decision point for the scheme at committee. The assurance tolerances for the recommended approval in this report are:

Assurance tolerances
Combined Authority funding remains within +10% of those outlined in this report. Completion/service delivery date remains within +6 months of those outlined in this report. Outputs remain within -10% of those outlined in this report.

### Appraisal Summary

4.56 The scheme is a successful UK City of Culture Bid with extensive research, evidence and supporting information provided.

4.57 There is clear alignment between local, regional and national policies and priorities, as well as strong alignment to Mayoral pledges, CA priorities and wider local and national government priorities.



- 4.58 As a charity, BCC is not bound by public sector directives, however their procurement processes and procedures are consistent with the framework provided by public sector guidelines and align to Bradford Councils processes and procedures.
- 4.59 At the time of appraisal, the financial case and information supplied is strong but full funding for this scheme is unsecured.
- 4.60 The aim is to have as many events free as possible, but there is still a potential for income generated through ticket sales and it would be beneficial to understand what the potential for income and/or revenue generated is and what (if any) processes for recovery of funds will be established and what clawback clauses will be included in funding agreements.
- 4.61 This scheme will be managed by Bradford Culture Company (BCC) Ltd with oversight from Bradford Council. BCC and the Council have entered into funding agreements and also an overarching Memorandum of Understanding (MoU) with DCMS in order to set out roles, responsibilities and obligations of each party in relation the UK City of Culture 2025 Programme and associated activity.
- 4.62 The scheme should be significantly positive, not just culturally but economically, for Bradford and the surrounding districts in West Yorkshire and beyond.

### **Recommendations**

- 4.63 The Combined Authority, subject to the conditions set by the by the Portfolio Investment Panel approves that:
- (i) The Bradford 2025 City of Culture scheme proceeds through decision point 4 (full business case) and work commences on activity 5 (delivery).
  - (ii) Approval to the Combined Authority's contribution of up to £5,700,000. This takes the total approval to £6,000,000. The total scheme value is £42,407,000.
  - (iii) The Combined Authority enters into an addendum to the funding agreement with Bradford Culture Company (BCC) Ltd for expenditure of up to £6,000,000.
  - (iv) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in this report.

### **Projects in Stage 3: Delivery and Evaluation**

- 4.64 There are no schemes to review at this stage.

## **5 Tackling the Climate Emergency implications**

- 5.1 The Climate Emergency implications have been considered on all projects included in this report as part of their business case development.

## **6 Inclusive Growth implications**

- 6.1 The inclusive growth implications have been considered on all projects included in this report as part of their business case development.

## **7 Equality and Diversity implications**

- 7.1 Equality Impact Assessments (EqIA) have been undertaken on all projects included in this report as part of their business case development.

## **8 Financial implications**

- 8.1 The report seeks endorsement to expenditure from the available Combined Authority funding as set out in this report.

## **9 Legal implications**

- 9.1 The payment of funding to any recipient will be subject to a funding agreement being in place between the Combined Authority and the organisation in question.
- 9.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **10 Staffing implications**

- 10.1 A combination of Combined Authority and local partner council project, programme and portfolio management resources are or are in the process of being identified and costed for within the schemes in this report.

## **11 External consultees**

- 11.1 Where applicable scheme promoters have been consulted on the content of this report.

## **12 Recommendations (Summary)**

### **British Library North**

- 12.1 The Combined Authority approves that:

- (i) Future approvals in relation to the British Library North scheme are delegated to the Combined Authority's Place Regeneration and Housing Committee.

### **West Yorkshire Tourism - LVEP**

- 12.2 The Combined Authority, subject to the conditions set by the Portfolio Investment Panel, approves that:

- (i) The West Yorkshire Tourism - LVEP scheme proceeds through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).

- (ii) Approval to the Combined Authority's contribution of £500,000 is given. The total scheme value is £500,000.
- (iii) The Combined Authority enters into a funding agreement with Leeds City Council for expenditure of up to £470,000.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in this report. Where required, any future committee level approvals are delegated to the Culture, Heritage and Sport Committee.

### **Bradford 2025 City of Culture**

12.3 The Combined Authority, subject to the conditions set by the by the Portfolio Investment Panel approves that:

- (i) The Bradford 2025 City of Culture scheme proceeds through decision point 4 (full business case) and work commences on activity 5 (delivery).
- (ii) Approval to the Combined Authority's contribution of up to £5,700,000. This takes the total approval to £6,000,000. The total scheme value is £42,407,000.
- (iii) The Combined Authority enters into an addendum to the funding agreement with Bradford Culture Company (BCC) Ltd for expenditure of up to £6,000,000.
- (iv) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report. This will be subject to the scheme remaining within the tolerances outlined in this report.

## **13 Background Documents**

13.1 None as part of this report.

## **14 Appendices**

Appendix 1 [West Yorkshire Tourism – Local Visitor Economy Partnership \(LVEP\) - Business Case Summary](#)

Appendix 2 [Bradford 2025 UK City of Culture - Business Case Summary](#)

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## Project Overview

Project Title	<b>West Yorkshire Tourism – Local Visitor Economy Partnership</b>
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Main Funding Programme	Gainshare
Current Forecast Project cost	£500,000
Funding Applied for from the Combined Authority	£500,000

## Scheme Description

The West Yorkshire Local Visitor Economy Partnership (LVEP) is a strategic collaboration between the five West Yorkshire districts and the Combined Authority, working together to drive forward the management and growth of the local visitor economy.

The scheme will support establishment of a Local Visitor Economy Partnership (LVEP) with an aim to deliver the Destination Management Plan.

## Business Case Summary

### Strategic Case

This scheme will deliver activities in support of WYCA's newly designated Local Visitor Economy Partnership status, accredited by VisitEngland, the official tourist board for England. The scheme will enable the CA, in partnership with our local authorities and the WY tourism sector, to collaborate on supporting and growing the visitor economy by implementing a Destination Management Plan with three work streams:

- Increase Awareness and Appeal,
- Develop Our Product and Places,
- Manage Our Visitor Economy Effectively.

The scheme is developed as West Yorkshire Investment Strategy's priority no. 6 Culture and Creative Industries and will contribute to investment priority no. 2 Skills and Training for People and investment priority no. 3 Creating Great Places and Infrastructure.

The scheme is aligned with the following Mayor's priorities:

2. Tackle the Climate Emergency and protect our environment

3. Prioritise skills and training to ensure everyone has the skills they need to secure work
4. Support local businesses and be a champion for our local economy
5. Lead a Creative New Deal to ensure our creative industries are part of our broader recovery strategy
8. Put keeping women and girls safe at the heart of my policing plan

#### Economic Case

No value for money calculations have been provided within the business case due to the type of scheme which is being undertaken.

#### Commercial Case

Leeds City Council will be the lead partner in the LVEP partnership with a direct contractual relationship with VisitEngland. As such will lead on procurement of required services, except external evaluation, which will be procured by the Combined Authority.

The engagement with the private sector has been achieved through LVEP Board membership. Once the scheme is in the delivery, further engagement and communication activities will be delivered by the lead partner.

#### Financial Case

The programme is to be primarily funded through Gainshare, totalling £500,000.

#### Management Case

This scheme will be managed by Leeds City Council. Delivery will commence in April 2024 and be completed by March 2026.

The LVEP Board, chaired by Mayor Tracy Brabin, will act as a project board for the scheme with meetings every two months. The LVEP will have a number of working groups to co-ordinate specific activities and agendas that will benefit from the combined expertise of LA Tourism leads: Marketing, Business, Strategy and Events sub-groups.

Details of Leeds City Council's delivery team have been provided within the business case.

## Project Overview

Project Title	Bradford 2025 UK City of Culture
Main Funding Programme	Gainshare
Current Forecast Project cost	£42,407,000
Funding Applied for from the Combined Authority	£6,000,000
Other public sector funding amounts and sources	£36,407,000 total public and private sector contributions from a variety of sources.
Private sector funding amounts and sources	

## Scheme Description

Bradford City of Culture 2025 is the successful UK City of Culture bid for 2025. BD25 will be a year-long programme of cultural events, festivals and celebrations bringing both local and global audiences to the West Yorkshire region. As well as cultural impacts, the year will provide significant economic growth to the region and surrounding areas – all while showcasing West Yorkshire’s dynamic creative industries and heritage.

## Business Case Summary

### Strategic Case

Bradford City of Culture 2025 aligns to priorities IP1: Good Jobs and Resilient Businesses, IP2: Skills and Training for People and IP4: Tackling the Climate Emergency and Environmental Sustainability of the West Yorkshire Investment Strategy (WYIS).

The scheme also aligns to multiple Mayoral pledges, but with particular alignment to pledge 5 (Lead a Creative New Deal to ensure our creative industries are part of our broader recovery strategy).

The scheme also has strategic alignment to the City of Bradford’s Metropolitan District Council’s Clean Growth plan and the West Yorkshire Combined Authority’s 2038 net zero target.

### Economic Case

The benefit cost ratio for the preferred option is 5.6:1 which is categorised as very high value for money.

### Commercial Case

Demand for the scheme is high and evidenced in Bradford being successfully awarded the UK City of Culture 2025 bid.

The 'preferred option' to bid for UK City of Culture 2025 was developed through extensive consultation with more than 7,000 people at 180 events. This was tested through board and community steering group workshops throughout 2021/22 and at full council meetings resulting in unanimous and cross-party support.

The scheme will be led by Bradford Culture Company Ltd – a registered charity, and not a public sector body. However, procurement processes and procedures are consistent with the framework provided by public sector guidelines and align to Bradford Council's processes and procedures.

### Financial Case

The total scheme costs are £42,407,000. The Combined Authority contributed £300,000 in development costs at Strategic Assessment. The remaining contribution of Combined Authority funding at full business case is £5,700,000.

Remaining costs are from public and private sector funding contributions.

### Management Case

The scheme will be delivered by Bradford Culture Company Ltd with oversight and collaboration from Bradford Council.

Bradford Council has appointed a Director of District Readiness and has created a district readiness structure to ensure the district is prepared for the increased media attention and footfall prior to and during the 2025 UK City of Culture. The Council's District Readiness Board (DRB) meets on a monthly basis and includes representation from BCC Ltd.



<b>Report to:</b>	Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Scrutiny Protocol Review</b>
<b>Director:</b>	Alan Reiss, Chief Operating Officer
<b>Author:</b>	Caroline Allen, Deputy Director of Legal, Governance and Compliance

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To present a Scrutiny Members' report which reviews the government's new Scrutiny Protocol and makes recommendations to the Combined Authority as to its implementation.
- 1.2 To seek agreement to a proposed scrutiny committee structure to be implemented from the 2024/25 municipal year onwards and to seek early comments on a draft Scrutiny Vision to be developed before subsequent adoption by the Authority.

## 2. Information

### Background

- 2.1 In 2020/21, a review of scrutiny arrangements was undertaken to ensure it was ready for the mayoral era. At the time, the Authority decided to implement a structure of three parallel scrutiny committees, divided by theme and function namely Corporate, Economy and Transport.
- 2.2 A commitment was made to further review the effectiveness these new scrutiny arrangements, including structure and resource, within the first mayoral term (before the 2024 election) – which this review fulfils.

### The Scrutiny Protocol

- 2.3 Since then, in November 2023, the government published a new Scrutiny Protocol – alongside the Autumn Statement and Level 4 Devolution technical document – setting out best practice for accountability and scrutiny within mayoral combined authorities.
- 2.4 The Protocol was developed in consultation with scrutiny officers, chairs and members nationwide as well as academic and sectoral experts from the ‘Centre for Governance and Scrutiny’, the House of Commons Library, ‘Onward’ and ‘The Bennett Institute’ at the University of Cambridge.
- 2.5 The Scrutiny Protocol identifies 18 Key Principles and 2 additional principles, which the scrutiny member report responds to. The Key Principles are summarised on the **contents page (p2)** of the full Scrutiny Members’ report attached as **Appendix 1**
- 2.6 The government has advised that compliance with the Protocol is a necessary step in future deeper devolution deals which include ‘single pot’ funding settlements. Most recently, in a letter to the Mayor, dated 1 March 2024, outlining the government’s Level 4 Devolution offer to the Combined Authority, the Secretary of State has confirmed that the Authority must “report to the Department for Levelling Up, Housing and Communities on its progress in implementing the scrutiny protocol by **1 March 2025**”.

### The Scrutiny Review and Recommendations

- 2.7 In December 2023, the Corporate Scrutiny Committee, with remit for governance and assurance, established a cross-party, cross-district working group of members from all three scrutiny committees to review the Protocol’s key principles and make any recommendations.
- 2.8 The working group met in January and February 2024 to review the Protocol and produce a report with its own recommendations, which was circulated to all scrutiny members and political and corporate leadership for feedback prior to publication on 29 February 2024 in the papers for Corporate Scrutiny Committee on 8 March 2024.
- 2.9 The working group’s goal was to review the Scrutiny Protocol’s requirements and recommend ways that the Combined Authority can implement it. There are over 60 recommendations in total, addressing all 20 principles within the Scrutiny Protocol, outlined in the executive summary on **pages 7-8** and expressed as a suggested Vision (**pages 9-13**) and phased implementation plan (**page 14**), with the primary recommendation being that:
- “The Scrutiny Protocol should be implemented in full and expressed as a clear, long-term vision with supporting annual plans focusing on implementation”.*
- 2.10 The recommendations comprise a mixture of broad strategic focussed proposals together with a range of detailed process-based proposals. However, one of the key conclusions throughout is that the quality of scrutiny is dependent on scrutiny members having the

right amount of support and availability – and commensurate remuneration – to perform their role properly. Most scrutiny work takes places outside of formal committee meetings, through officer briefings, overview / monitoring, working groups and reviews – all of which require time and resource, which are limited under the current arrangements. Changes in processes, focus, practice and investment are required to significantly improve scrutiny.

2.11 Subject to Members' views, officers can progress the more detailed aspects of changes to scrutiny arrangements to reflect the recommendations and compliance with the Protocol and bring forward a subsequent report to the Combined Authority identifying proposed activity to be introduced over the next 12 months in the first instance. However, there are some key strategic issues that require a decision now if structural changes are to be made to the committee arrangements and roles and responsibilities of scrutiny members to be implemented from the new municipal year. These are set out below for Members' consideration and relate to:

- Committee structure
- Membership and role profiles

2.12 To note, the Corporate Scrutiny Committee is considering the Scrutiny Members' report at its 8 March 2024 meeting, which is after the publication of these papers. A verbal update will be provided to Combined Authority Members following the conclusion to that meeting.

### **Committee Structure**

2.13 The scrutiny working group considered several options in terms of committee structure (**outlined on page 17**) but ultimately did not make a recommendation to the Combined Authority on a preferred model, recommending only that whichever structure is selected is 'properly resourced to operate as intended'.

2.14 The working group did note that the Scrutiny Protocol recommends a single committee model, citing the key necessity that all scrutiny members operate as a 'single pool' ("Key Principle 1") and have oversight of all a mayoral combined authority's fundamentally cross-cutting activity – as combined authorities do not have an equivalent overarching body to full council or political groups, which all scrutiny members belong to in a local authority.

*"[Scrutiny Protocol 2.2] In combined authorities and combined county authorities, a **single committee model should be considered to provide a shared platform from which all committee members can develop a strategic overview across all portfolio areas and an understanding of the interconnection of key policies to effectively scrutinise cross cutting issues. If another model is used it should be clear how this model is able to meet the key principles identified in this Protocol.**"*

## Challenges with the Current System

2.15 The Scrutiny Members' report also noted the challenges with the current scrutiny arrangements, some of which relate to the parallel committee structure (from pages 15-16) including:

- **Resourcing challenges** – scrutiny, governance, and the wider officer core which Scrutiny relies on for reports, information and analysis is spread across a number of committee meetings and members across the governance structure (not just scrutiny) – and even local authority scrutiny committees – leading to capacity struggles and gaps in member support.
- **Member availability and support** – a frequently changing membership each year, unable to dedicate enough time to the increasing demands of the role and attending meetings, with a complicated substitute system, leading to persistent quoracy issues (outlined below in Figure 1) when coupled with officer resourcing challenges, has meant members have not felt supported in their roles and the time they do dedicate is not actualised in terms of impact. A few councils have struggled to appoint members to persistent vacancies.
- **'Silo scrutiny'** – fragmented 'silo working' with committees looking at different issues from different points of view, keen not to step into each other's remits, without a single group with an overview of all activity to spot patterns and understand wider context. Remits have been shuffled numerous times but still leave unnecessary strategic gaps, no one has 'ultimate authority' and scrutiny members are not part of a single body where they would be briefed on all the authority's work, as they are at full council.
- **Reactive, less strategic** – due to the combination of thematic and function based remits and lack of central oversight, along with officer resourcing pressures, the committees end up reacting to the thematic committees chaired by the Authority's portfolio holders and responding late to issues that have already emerged or progressed, engaging in little pre-decision scrutiny, and not maintaining a pro-active strategic work programme.
- **Outcomes and impact** – Due to the pressures and challenges referenced above, the committees have not been able to conduct reviews or produce reports as a direct outcome of their work, and any 'soft' recommendations have been difficult to both prove and track as evidence of Scrutiny's impact; to date, no review has been completed by a scrutiny committee at the Combined Authority in the mayoral era.

*Figure 1 – Proportion of meetings with quoracy issues (June 2021-February 2024)*

Scrutiny Committee	Inquorate (Less than required)	Nearly inquorate (Minimum required)	TOTAL w/ quoracy issues
Corporate	20%	10%	30%
Economy	60%	10%	70%
Transport	10%	40%	50%
<b>ALL</b>	<b>30%</b>	<b>20%</b>	<b>50%</b>

### Single Committee Model

- 2.16 The recommendation is that the single committee structure best meets the requirements of the Scrutiny Protocol. It is considered that this would allow for the most efficient use of resources, more intensive 1-1 scrutiny member support and briefing, which would enable a more flexible working model, with closer overview and monitoring, and reviews being conducted through working groups/panels without the statutory and administrative limits of committee meetings.
- 2.17 Scrutiny can do “more with less” and produce a greater output of deeper, higher level reviews providing answers and solutions to the most persistent strategic problems the CA faces with the right “quality over quantity” approach; a focused single committee, an accountable chair able to dedicate more time to the role, supportive enhanced vice-chair positions, slightly fewer but much better supported, trained and resourced members (with dedicated named substitutes), and a strategic approach to work programming.
- 2.18 This would need to be reviewed over time, recognising that it may be appropriate in future to expand upon the single committee and add permanent (non-statutory) panels – or (formal statutory) subcommittees – as the CA grows and expands, for example: a “transport service panel” to oversee the growing and complex bus reform and mass transit projects and future service delivery in the future.
- 2.19 Reassessment and adoption of role profiles for the scrutiny chair, vice chair(s), members and substitutes is required by the Scrutiny Protocol and is good practice – so that both members and constituent authorities are clear on what the duties, expectations and time requirements are, which can be taken into account in member appointment. The Independent Remuneration Panel also needs these to properly assess allowances.

### Draft Long Term Scrutiny Vision

- 2.20 A long term draft Scrutiny Vision has been prepared for Members’ consideration, which takes into account the Scrutiny Protocol and the Scrutiny Members’ report, modelled around the proposal for a single overarching ‘select-committee style’ structure which is supported by panels and working groups. This is attached as **Appendix 2**.
- 2.21 The draft Vision is intended to provide an easily accessible overview and early draft of the Authority’s response to the Scrutiny Protocol – recognising that this may need revision and refinement to reflect Members views on the strategic issues raised in this report for consideration. It is shared at this point to seek Members’ views on the approach taken and can subsequently be developed and brought back to Members for adoption.

2.22 It sets out a proposed comprehensive and ambitious approach to regional, strategic level scrutiny – and in summary, it consists of:

- **Committee and working groups:** One single overarching ‘select committee style’ committee with a wide terms of reference and remit, which splits into flexibly operated panels and working groups to perform tasks and maintain overview.
- **Chair role:** One single, accountable ‘fuller-time’ Scrutiny Chair who is expected to be able to dedicate enough time every week to properly maintaining an overview of the organisation, interface regularly with officers, and direct scrutiny work accordingly.
- **Vice Chairs:** Two enhanced vice-chair positions modelled on the Transport Committee’s dual-deputy-chair arrangement, who will each oversee a strategic portfolio, and constitute a visible senior scrutiny leadership to support the chair with the volume of work.
- **Membership and roles:** A politically and geographically balanced membership – each with a named substitute – with more defined member roles, supported with regular 1-1s, training/development, research and briefings, and their own portfolio area to lead overview and scrutiny on.
- **Officer support:** A professional dedicated team of scrutiny officers to provide independent advice and greater interface with existing expertise already employed at the CA including the high-class research and intelligence, portfolio management, comms and marketing, policy and strategy, and performance management teams.
- **Profile and stakeholders:** A higher profile and greater communications and marketing resource in order to build its own network of stakeholders, engage more directly with the public, manage both verbal and written evidence gathering directly from those affected, and promote its work and conclusions as widely as possible.
- **Work programme:** A more strategic and outcomes-focused approach to its work programme which focuses on demonstrating the value and impact of good scrutiny on the CA’s decisions, policies, services and outputs.
- **Reviews and evidence sessions:** Greater use of public verbal evidence sessions and written evidence to engage in “outward” facing interface with the political leadership, experts and the public and those impacted by CA activity in order to conduct in-depth reviews and publish reports.

## **Future Review and Evolution**

- 2.23 The Protocol requires, and the Scrutiny Members' report recommends, that 'mini-reviews' of scrutiny's effectiveness take place regularly. The draft Scrutiny Plan appended to the draft Vision at **Appendix 2** suggests this takes place in Phase 4 (Evaluation, Impact) in the 2026/27 municipal year, two years after establishment, to ensure that the Scrutiny Vision is still sound and fit for purpose and the level of CA activity and scrutiny operation are still balanced.

### **3. Tackling the Climate Emergency Implications**

- 3.1 There are no climate emergency implications directly arising from this report but, in general, an improved and robust scrutiny function will better monitor, scrutinise and drive improvements in all outcomes including those related to tackling the climate emergency.

### **4. Inclusive Growth Implications**

- 4.1 There are no inclusive growth implications directly arising from this report but, in general, an improved and robust scrutiny function will better monitor, scrutinise and drive improvements in all outcomes including those related to inclusive growth.

### **5. Equality and Diversity Implications**

- 5.1 There are no equality and diversity implications directly arising from this report but, in general, an improved and robust scrutiny function will better monitor, scrutinise and drive improvements in all outcomes including those related to EDI workstreams – and making improvements in how Scrutiny Members are selected, trained, supported and remunerated could likely attract a wider base of membership interested in the role.

### **6. Financial Implications**

- 6.1 There are no financial implications directly arising from this report, but, in general, an improved and robust scrutiny function could better monitor, scrutinise and drive value for money improvements across the CA's activities and functions, internally, financially and strategically.
- 6.2 Successfully implementing and sustaining the Scrutiny Protocol has been cited by the central government as a requirement to secure deeper devolution deals which provide greater financial autonomy in administering previously ringfenced departmental funding streams as single pots, which will allow for funds to be redeployed more flexibly than they are the moment, including on administrative efficiencies – and ultimately, possibly, complete departmental-style single settlement funding.
- 6.3 Any change in the number of formal committees, members, chairs, deputy chairs and general scrutiny member role profiles may change the level of remuneration and the overall amount spent on remuneration, in either direction, subject to review by an

Independent Remuneration Panel – as required by law. Legally, the Combined Authority can approve allowances lower than the IRP sets, but not more.

- 6.4 Extra resourcing for the procurement of member training and consultative-style advice and briefings from subject experts may require additional financial resource, but long-term efficiencies are possible if bespoke re-usable training materials are procured on a one-off basis for delivery by internal staff long-term, for example.
- 6.5 There are unavoidable direct and indirect financial implications from increasing scrutiny activity and scope related to staff resource, outlined under the “Staffing Implications” heading below.

## **7. Legal Implications**

- 7.1 There are no legal implications directly arising from this report, but the Combined Authority already complies with all statutory requirements relating to governance and scrutiny already as a matter of course.
- 7.2 The Scrutiny Protocol is not legislation but government guidance. The Combined Authority’s constitution (Scrutiny Standing Order 16) obligates it to ‘have regard’ for government guidance in the formation and operation of its scrutiny function.
- 7.3 Scrutiny committees are not decision-making committees and may only make recommendations to decision-makers. The Combined Authority decides all governance matters including scrutiny arrangements and procedures, within statutory limits.
- 7.4 Any changes to scrutiny arrangements must be considered in Annual Meeting/Council planning well in advance so that officers and elected members in the constituent councils are able to take it into account when they consider committee appointments following the elections and annual council meetings in May 2024.
- 7.5 It is expected that from late March 2024, there will be a new statutory requirement for combined authorities to convene an Independent Remuneration Panel to assess and recommend allowances paid to members on scrutiny committees – which was already the established practice of the Combined Authority to date.
- 7.6 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

- 8.1 There are no staffing implications directly arising from this report, but greater scrutiny activity in both quantitative and qualitative terms is likely to require greater direct and indirect staff resource to facilitate the establishment of changes in practice and operation together with a level of cultural change to embed new ways of working.



8.2 As a general rule, the greater the number of committees / sub-committees, co-opted members and formal meetings, the greater resource is necessary to administer them. The use of informal structures and meetings, such as working groups, evidence sessions, and individual scrutiny are not subject to the formalities of statutory committee meetings but would still require both admin and non-admin resource, such as research, analysis and policy recommendation.

8.3 The Scrutiny Protocol and the Scrutiny Members' report also addresses the situation with combined authority officer time and resource being requested at local authority's scrutiny committees on a regular basis.

## **9. External Consultees**

9.1 No external consultations have been undertaken but the draft versions of the working group's report were circulated to scrutiny members on all three Combined Authority scrutiny committees and to the corporate and political leadership of the Combined Authority and local authorities.

## **10. Recommendations**

10.1 That the Combined Authority considers and provides initial feedback on the Scrutiny Members' recommendations as set out in the report at Appendix 1 and requests officers to progress the more detailed recommended changes to scrutiny arrangements and bring forward a subsequent report to the Combined Authority identifying proposed activity to be introduced over the next 12 months in the first instance.

10.2 That the Combined Authority agrees to adopt a Scrutiny Protocol compliant single committee scrutiny structure as the proposed model for Scrutiny from the 2024/25 municipal year to be confirmed at the June 2024 annual meeting following assessment by the Independent Remuneration Panel.

10.3 That the Independent Remuneration Panel established by the Combined Authority at its 1 February 2024 meeting be convened to assess member allowances according to the role profiles and committee structure outlined in the draft Scrutiny Vision or as alternatively advised by Members.

## **11. Background Documents**

Background documents are listed within the Scrutiny Members' report at Appendix 1.

## **12. Appendices**

Appendix 1 [Scrutiny Protocol Review Members' Report](#)

Appendix 2 [Draft Proposed Scrutiny Vision 2028 and Scrutiny Plan 2024-2028](#)

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West  
Yorkshire  
Combined  
Authority

Tracy  
Brabin  
Mayor of  
West Yorkshire



# Scrutiny Protocol Review

Corporate Scrutiny Committee  
Members Report

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# Introduction

## Greater Devolution, Greater Scrutiny

This review was undertaken by Scrutiny Members led as a demonstration of an independent and honest assessment of where Scrutiny is now and where it needs to be in future to fulfil its duties.

It is a follow up review to the last review of scrutiny arrangements in 2020, after the agreement of a mayoral devolution deal, which resulted in the current scrutiny system in place since May 2021.

At the time, it was understood that greater devolution should require greater scrutiny – and that principle is still true now.

The public want to be assured that devolved funding and powers are being properly scrutinised and challenged.

The government published a new Scrutiny Protocol, co-developed with scrutineers and experts nationally, to support combined authorities in conducting good scrutiny and possibly accessing deeper devolution in the future.

The Protocol is a genuinely good summary of good scrutiny which all combined authorities should aim to implement.

It consists of 18 Key Principles and 2 additional principles which this working group was established to review and make recommendations on.

This report includes many comprehensive, wide-reaching recommendations based on the collective experience of scrutiny chairs, Members and officers over the years.

The recommendations form a long-term ambitious vision for an ideal Scrutiny function which adds genuine value and is right for the West Yorkshire Combined Authority.

## The “Perennial Problem”

There’s a perennial problem with how Combined Authority governance structures were established, which has created a fundamental scrutiny deficit.

The only regional mayoral authority prior to their establishment in the English regions was in Greater London, whose Mayor is scrutinised by 25 directly elected full-time members (“AMs”), who have considerable coverage through an overarching body (“the London Assembly”), 13+ committees and a total support staff of over 100; including over 50 in committee services, over 20 scrutiny and research officers, and a team of dedicated comms and marketing officers.

In the West Yorkshire Combined Authority, Scrutiny is conducted by 48 part-time councillors, on top of their local council and ward duties and full-time jobs, across 3 separate co-equal committees supported by 2 officers.

The legislative basis and functions – as well as the geography, population, and budget (roughly three times more) – differ between West Yorkshire and London and even between different mayoral combined authorities.

This does not serve as an argument that what works in London and other mayoral areas will work in West Yorkshire, but the picture presents an idea of the scale and challenge of scrutinising complex activity at a regional county level compared to the resources and member time available.

For combined authorities, it was assumed that part-time councillors from constituent authorities who already have other responsibilities could be co-opted onto combined authority scrutiny committees to do the same job with less.

This was already a tall order, and as combined authorities and metro-mayors evolved and expanded in funding, powers, and profile – the order has become taller and taller, without commensurate resources to match.

Combined authorities are evolving and may change in the future but in the meantime, the Scrutiny Protocol and this report's recommendations attempt to bridge the gap of this scrutiny deficit and suggest creative, resourceful ways of working to ensure that Scrutiny is productive, challenging and makes a *provable* impact on the Combined Authority's outcomes and on lives of the people of West Yorkshire.

## Terms of Reference

This working group was established on 24 November 2023 by the Corporate Scrutiny Committee to:

1. review the newly published Scrutiny Protocol and its Key Principles.
2. assess the Combined Authority’s current compliance with it.
3. make any recommendations needed in order to make improvements.
4. report any findings and recommendations to the appropriate decision-maker.

## Membership

The responsibility for convening and approving this report and its recommendations falls within the remit of the Corporate Scrutiny Committee and the working group was chaired by that committee’s Chair.

However, the working group was a joint-scrutiny effort calling on members from all three scrutiny committees and seeking representation from all council areas and political parties.

Member	Scrutiny Committee	Council	Party
Cllr Aneela Ahmed	Economy	Bradford	Labour
Cllr Barry Anderson (Chair)	Corporate (Chair)	Leeds	Conservative
Cllr Kayleigh Brooks	Transport & Infrastructure	Leeds	Labour
Cllr Bob Felstead	Economy (Deputy)	Bradford	Conservative
Cllr Samantha Harvey	Corporate	Wakefield	Conservative
Cllr Charlie Keith	Transport & Infrastructure	Wakefield	Labour
Cllr Susan Lee-Richards	Corporate	Kirklees	Green
Cllr Dave Merrett	Transport & Infrastructure	York	Labour
Cllr Amanda Parsons-Hulse	Transport & Infrastructure (Chair)	Calderdale	Lib Dem
Cllr Andrew Pinnock	Transport & Infrastructure (Deputy)	Kirklees	Lib Dem
Cllr Richard Smith	Economy (Chair)	Kirklees	Conservative

The Working Group was also advised in part by Debbie Simpson, Independent Chair of the Combined Authority’s Governance and Audit Committee, at their first session.

## Timeline

- 22 November 2023 – Scrutiny Protocol published as part of the Autumn Statement
- 24 November 2023 – The working group and its terms of reference was established
- December 2023 – Recruitment of working group members from all three committees
- January 2024 – Discussion on Protocol at scrutiny committees
- 29 January 2024 – 1<sup>st</sup> session of working group, reviewing Key Principles and suggestions
- 9 February 2024 – draft report sent to all scrutiny members and corporate/political leadership
- 16 February 2024 – 2<sup>nd</sup> session of working group, finalisation of report and recommendations
- 29 February 2024 – publication of final report

## Background information

Links to background documents and information referenced throughout and considered by the Working Group during its deliberations are available at the end of the report under “Background documents”.

These include, amongst others, the following:

- the government's Scrutiny Protocol (2023)
- the previous WYCA scrutiny review conducted in 2020 and subsequent decision in 2021
- Greater Manchester independent review of scrutiny 2022/23 and subsequent CfGS '1 year on' evaluation in 2023
- West Midlands IRP's review of scrutiny allowances and review of Transport Committee in 2023
- English devolution framework, Level 4 Devolution technical document and the Combined Authority's letter to the government in 2023/24

## Glossary and acronyms

CA – *Combined Authority (a type of local government authority that is a partnership of two or more local councils)*

Constituent council / authority – *the five West Yorkshire member authorities which make up West Yorkshire Combined Authority (Bradford, Calderdale, Kirklees, Leeds and Wakefield)*

GMCA – *Greater Manchester Combined Authority*

IRP – *Independent Remuneration Panel (made up of independent persons who review and determine allowances for various member positions at a local or combined authority)*

ITA – *Integrated Transport Authority (the previous transport authority which WYCA was established from in 2014)*

KD – *Key Decision (any decision spending £1m+ or affecting two or more electoral wards, as defined in the Access to Information Rules of the WYCA Constitution)*

KPI – *Key Performance Indicators*

MCA – *Mayoral Combined Authority (a combined authority led by a directly elected metro-mayor)*

MQT – *Mayors Question Time (for members of the public to question the Mayor in 'town hall' style sessions moderated by an independent local journalist or businessperson)*

MQs – *Mayors Questions (for scrutiny members at scrutiny committee meetings to question the Mayor)*

Non-constituent council / authority – *the non-voting observer member (City of York Council)*

OfLog – *Office for Local Government (not yet in operation)*

WMCA – *West Midlands Combined Authority*

WY – *West Yorkshire*

WYCA – *West Yorkshire Combined Authority*



# Recommendations

Scrutiny does not have the power to make decisions, only to make recommendations which the decision-maker must then consider and decide whether to implement and how – or not.

There are over 60 recommendations in this report, grouped around 20 recommendation summaries – one for each of the Protocol's 18 Key Principles and the 2 additional principles.

The recommendations are:

- designed to ensure Scrutiny fulfills the requirements of the Scrutiny Protocol in the long term.
- comprehensive and a combination of broad strategic-focused recommendations and detailed process-focused recommendations,
- a general consensus of what the working group agreed and areas where there was no consensus are left open to the Combined Authority, such as the overall committee model.
- directed towards the:
  - Combined Authority, both as a decision-making entity (Mayor, CA Members) and as a corporate entity (officers and leadership).
  - constituent authorities, through the Combined Authority in its role as a partner, on matters relating to their functions e.g. member appointments and how combined and local scrutiny committees can cooperate.
  - future WYCA Scrutiny members, in matters under Scrutiny's control e.g. work programming and meeting format.

## Executive summary of recommendations

The following is a summary of each *group* of recommendations under each Key Principle; the full recommendations (over 60+ in total) and their formal wording are within the report.

### Primary Recommendation:

***The Scrutiny Protocol should be implemented in full and expressed as a clear, long-term vision with supporting annual plans focusing on implementation.***

### Recommendation summaries:

1. Consider a committee model which fulfils the requirements of the Scrutiny Protocol, to be reviewed in a few years, and is properly resourced to operate as intended. (p15-18)
2. Consider reprofiling substitutes as 'deputies' with enhanced duties supporting their member scrutinise issues within their portfolio, if a single committee model is adopted. (p18-19)
3. Continue to calculate political balance across the entire scrutiny membership, including substitutes if appointed, to allow for the most representative political balance. (p19)
4. Consider calculating geographic balance based on the number of members each council has and support members to see issues through a WY-wide lens. (p19-20)

5. Consider the role profile of the Scrutiny Chair, the time requirement, and how they are selected, to ensure they have independence and greater parity in their profile, support and access to resources. (p20)
6. Establish role profiles for all scrutiny members and roles, including substitutes if appointed, and encourage councils to appoint members for longer terms. (p21)
7. Dedicate more resources to onboarding, developing and engaging with scrutiny members on a 1-1 basis to boost attendance, their skills and the quality of scrutiny. (p22)
8. Help scrutiny build its own network of experts to call upon, including drawing upon existing stakeholders engaging with other committees and service areas. (p22-23)
9. Convene an IRP to reconsider allowances, as required, if role profiles are reviewed in light of enhanced member and committee duties and increase the officer resource and capacity available for direct scrutiny work. (p24-25)
10. Revisit Mayors Questions format, scrutinise political leadership more often and extend invitation to scrutiny chairs and members to appropriate meetings, like the main CA. (p25-26)
11. Look to improve Scrutiny's participation in, and impact on, major strategies, policies and decisions at earlier stages. (p27-27)
12. Improve and strengthen the call-in process and key decision records and transparency. (p27-28)
13. Provide full monthly and quarterly KPI data in a scrutiny-friendly format for close long-term monitoring. (p28)
14. Provide all necessary information, data and resources so Scrutiny can establish (and monitor) a suitably comprehensive, but strategic work programme. (p29-30)
15. Conduct more 'task and finish' reviews and involve Scrutiny more in other ongoing non-Scrutiny reviews. (p30)
16. Agree a WY-wide protocol to manage scrutiny co-working and duplication and establish a dedicated communications plan and resource for WYCA scrutiny activity. (p30-31)
17. Review scrutiny arrangements and effectiveness more frequently and publish impact-focused annual scrutiny reports. (p32)
18. Use OfLog's data when available and notify Scrutiny of external reviews being undertaken on WYCA. (p32-33)
19. Conduct an Audit-led review of audit committee, including resource and membership and establish co-working between scrutiny and audit chairs and work programmes. (p33)
20. Continue to host regular, widely marketed public Mayors Questions Time. (p34)

## Long term vision

There is a recognition that there are many recommendations within this report covering many issues and that it would take some time to implement many of them and build up the scrutiny function to the enhanced level the Combined Authority and region needs.

Therefore, it is useful to see the entire plan presented in the form of a clear long-term vision and a supporting, phased implementation plan that can be easily tracked and monitored during that time.

- **Scrutiny Vision:** Long term strategic vision to be achieved by 2028 (by the 3<sup>rd</sup> Mayoral election) with significant progress by 2025/26.
- **Scrutiny Plan:** Short/medium term implementation plans to implement the Vision to be overseen jointly by Scrutiny and the Combined Authority on an annual basis.

## WYCA Scrutiny Vision 2028

Summary – WYCA Scrutiny Vision 2028	
<b>Ambition</b>	<p>The Scrutiny Vision aims to position WYCA's Scrutiny function to:</p> <ul style="list-style-type: none"> <li>• Go above and beyond the Scrutiny Protocol and best practice.</li> <li>• Determine a unique approach suited to the unique needs of regional, strategic scrutiny in West Yorkshire, compared to local authority-level scrutiny or MCA scrutiny elsewhere.</li> <li>• Support WYCA's fundamental strategic purpose, defend the interests of the organisation with regards to its functions and consider the needs of <i>all</i> WY residents it serves.</li> <li>• Foster and sustain an organisational culture within WYCA where scrutiny and challenge is welcomed, independent, and impactful.</li> <li>• Become demonstrably outcomes-focused, no different to any other corporate core service, which can prove the impact it makes on a regular basis.</li> </ul>
<b>Role</b>	<p>To directly scrutinise, advise and hold the Mayor and Combined Authority to account in public and private.</p> <p>To have a unique role and purpose, not conducted by other committees, focused on providing serious challenge to identify, monitor and resolve 'persistent strategic challenges' by:</p> <ul style="list-style-type: none"> <li>• Enabling – supporting (but not <i>leading</i>) <ul style="list-style-type: none"> <li>○ policy development</li> <li>○ service improvement</li> <li>○ programme delivery</li> </ul> </li> <li>• Protecting – monitoring <ul style="list-style-type: none"> <li>○ activity, risks and performance</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ studying data and information</li> <li>○ maintaining accountability</li> <li>○ investigating persistent issues.</li> </ul> <p>A wide Terms of Reference which clearly outlines Scrutiny’s powers and responsibilities, to provide maximum manoeuvrability and oversight.</p> <p>Strictly non-parochial and non-partisan – having a holistic, strategic focus which considers WYCA and West Yorkshire’s interests.</p> <p>An understanding with local scrutiny functions on rules of engagement in scrutinising cross-cutting areas, including formal referral and joint scrutiny arrangements.</p>
<p><b>Structure</b></p>	<p>An overarching, strategic overview and scrutiny committee supported <b>either</b> by multiple formal committees/subcommittees <b>or</b> more flexible member-led panels / working groups able to operate more flexibly and with greater focus.</p> <p>Permanent working groups (‘panels’) to focus on <i>overview</i> duties monitoring activity and advising the committee:</p> <ul style="list-style-type: none"> <li>● KPIs and budget</li> <li>● key decisions &amp; project delivery</li> <li>● portfolios, committees and directorate activity</li> <li>● recommendations and the work programme</li> <li>● public &amp; democratic (member) engagement</li> </ul> <p>Temporary working groups (‘task and finish’) to focus on <i>scrutiny</i> duties and report back to committee:</p> <ul style="list-style-type: none"> <li>● fact finding and answering questions</li> <li>● reviewing and investigating issues and decisions</li> <li>● making recommendations</li> <li>● policy &amp; strategy review and challenge</li> <li>● call-in</li> </ul>
<p><b>Membership</b></p>	<p>Politically and geographically proportionate membership; calculated across both members and deputies (substitutes) to ensure maximum representation in terms of parties and place (i.e. urban, rural).</p> <p>A ‘fuller-time’ Chair able to dedicate time to maintaining a comprehensive overview of WYCA activity and maintain a degree of parity in officer interface and profile.</p> <p>Independent Member(s) recruited, as required, for longer terms to maintain continuity over many years and provide expertise.</p> <p><i>To be determined based on final structure, but if adopting a single committee model, should consider: two Vice Chairs,</i></p>

	<p>overseeing a strategic portfolio, managing a pool of trained, well-supported Members appointed for multi-year terms, who each oversee portfolio areas and working groups as a team.</p>
<p><b>Duties</b></p>	<p>Role profiles clearly outlining each Member’s responsibilities, be maintained and regularly reviewed.</p> <p><i>To be determined based on final structure, but if adopting a single committee model, should consider the following role profiles:</i></p> <p>The roles:</p> <ul style="list-style-type: none"> <li>• Chair x 1: Overall Lead</li> <li>• Vice Chairs x 2: Strategic Leads (<i>possibly: Infrastructure and Economy</i>)</li> <li>• Members: Portfolio / Working Group Leads</li> <li>• Deputies (formerly substitutes): Assistant Portfolio / Working Group Leads (as appropriate)</li> <li>• Independent Member</li> </ul> <p>1 x <u>Chair</u> (‘Overall Lead’) is expected to:</p> <ul style="list-style-type: none"> <li>• Manage all committee meetings and agendas</li> <li>• Oversee overall MCA strategy, WY Plan and activity</li> <li>• Oversee corporate issues, assets and services</li> <li>• Manage Vice Chairs and other leads</li> <li>• Shadow the Mayor</li> <li>• Interface regularly with officers internally</li> </ul> <p><u>2 x Vice Chairs</u> (‘Strategic Leads’) are expected to:</p> <ul style="list-style-type: none"> <li>• Support the Chair as required throughout the year</li> <li>• Manage/Chair all relevant meetings within their strategic portfolio</li> <li>• Act as a ‘strategic portfolio lead’ and oversee multiple portfolio areas under two strategic categories, e.g.             <ul style="list-style-type: none"> <li>○ <i>Economy (Business, Skills, Culture portfolios)</i></li> <li>○ <i>Infrastructure (Transport, Environment, Place portfolios)</i></li> </ul> </li> <li>• Manage ‘portfolio leads’ within their strategic portfolio</li> <li>• Shadow appropriate strategic chairs <i>i.e. the Transport Committee and Business Board chairs</i></li> </ul> <p>TBC x <u>Members</u> (‘Portfolio Leads’) are expected to:</p> <ul style="list-style-type: none"> <li>• Attend all meetings or send their Deputy</li> <li>• Brief and keep their Deputy in the loop on their portfolio</li> <li>• Act as a portfolio lead – maintaining a watching brief over activity in their portfolio area, attend relevant meetings, take relevant briefings, and lead updates and questioning on that area</li> <li>• Chair working groups and reviews as required</li> </ul> <p>TBC x <u>Deputy Members/Substitutes</u> (‘Assistant Portfolio Lead’) are expected to:</p>

	<ul style="list-style-type: none"> <li>• Attend all meetings as required with, or on behalf of, their Member</li> <li>• Keep in the loop on all matters related to their portfolio</li> <li>• Act as a deputy portfolio lead – maintaining a watching brief over activity in their portfolio area, attend relevant meetings, take relevant briefings, and lead updates and questioning on that area, and advice their Member on anything of note</li> <li>• Chair working groups and reviews as required</li> </ul>
<p><b>Support</b></p>	<p>To perform enhanced duties, Members will be provided with:</p> <ul style="list-style-type: none"> <li>• Appropriate allowance level and travel expenses commensurate with new enhanced duties.</li> <li>• Onboarding and induction at the beginning of the year, with frequent in-year follow up.</li> <li>• Training, development and ‘360 performance review’ throughout the year, as required.</li> <li>• Engagement through regular 1-1s and catch ups.</li> <li>• Summaries, analysis and advice on lines of questioning in advance of meetings to ensure productive, strategic scrutiny.</li> <li>• Direct access to relevant information, members, officers and meetings, as required (i.e. Key Decisions, agenda forward plans, reports/committee papers, media scanning, briefing notes) at an equal level to ‘Executive’ members.</li> </ul> <p>Scrutiny will be well resourced and supported by a dedicated team of scrutiny support officers able to provide independent overview, scrutiny, research, review, analysis, advisory and administrative duties, reporting to the statutory scrutiny officer.</p>
<p><b>Meetings</b></p>	<p>An appropriate number of full committee meetings per year supplemented with regular meetings of panels, working groups, workshops, briefings and director / portfolio holder catch ups – as required.</p> <p>Public committee meetings have two purposes/outcomes:</p> <ul style="list-style-type: none"> <li>• Document accountability; ‘challenge and shine a light’</li> <li>• Manage recommendations; ‘drive and monitor improvement’</li> </ul> <p>These outcomes will be primarily pursued in two formats:</p> <ol style="list-style-type: none"> <li>1. Inward (member-member interface): members reporting on their inter-meeting overview and scrutiny duties and agreeing recommendations and actions</li> <li>2. Outward (member-witness interface): members questioning relevant witnesses (politicians, experts, public, officers) on overarching strategic themes and challenges to build evidence to agree recommendations and actions</li> </ol> <p>Business-focused sessions (Inward):</p>

	<ul style="list-style-type: none"> <li>• Early “AGM-style” agenda to formally confirm governance and work programme (i.e. member roles and working groups) and consider previous year’s annual report.</li> <li>• Mid-year “State of the union” meeting to consider the overall performance situation and the previous, current and next year’s budget and business planning.</li> <li>• Late year “final chance” meeting in before the pre-election period to wrap up the municipal year’s business and decide how to monitor issues during the election/nomination season.</li> <li>• Pre-meeting for Members to ask clarifying questions on reports and receive briefings on live issues.</li> <li>• Standing items: minutes/notes of relevant meetings, work programme, member reports, working group reports, review reports and recommendation tracking.</li> </ul> <p>Evidence-focused sessions (‘Outward’):</p> <ul style="list-style-type: none"> <li>• Members, officers, experts, guests, other members invited to be questioned and give evidence.</li> <li>• Focusing on answering themed, strategic, cross-cutting questions e.g. <i>“Is WYCA activity Leeds-centric?”</i> or <i>“Are residents and members views being taken into account in decision-making?”</i></li> <li>• Pre-meeting for Members to ask clarifying questions, discuss lines of questioning and establish outcomes.</li> <li>• “Wrap up” to establish conclusions, next steps and emerging recommendations.</li> <li>• Reports include cross cutting background information, data and analysis and aim to support Members’ in-session questions.</li> </ul>
<p><b>Profile</b></p>	<p>Parity of profile with executive members, in terms of access to organisational resources and impartial advice by officers.</p> <p>Reporting scrutiny activity to other committees, including through attendance by appropriate Scrutiny Members at appropriate meetings (i.e. Scrutiny Chair / Vice Chairs at the main Combined Authority meetings).</p> <p>Consideration of Scrutiny’s work programme and recommendations in the MCA’s planning, decision-making and activity to ensure Scrutiny participates and contributes to key areas of work.</p> <p>Dedicated communications plan to support and promote Scrutiny activity, including consultation, press releases and social media management.</p> <p>Maintain its own network of stakeholders including members, the public, experts, and scrutiny partners to support the scrutiny process.</p> <p style="text-align: center;">423</p>

## WYCA Scrutiny Plan 2024-2028

Summary – WYCA Scrutiny Plan 2024-2028			
Phase	Focus	Years	Objectives
1	Agreement (Vision)	2023-24	<p>Review and approve improved scrutiny arrangements.</p> <ul style="list-style-type: none"> <li>Review the Scrutiny Protocol, make recommendations and propose consensus-based Vision.</li> <li>Convene an IRP to assess allowances according to new enhanced duties.</li> </ul>
2	Development (Resources)	2024-25	<p>Build new structures, processes, systems, resources, and member roles:</p> <ul style="list-style-type: none"> <li>Implement new committee and working group structure.</li> <li>Recruit, induct and train members – and assign and test new member roles.</li> <li>Identify biggest strategic challenges and establish long term work programme goals.</li> <li>Conduct reviews through working groups.</li> <li>Determine officer support structure (i.e. recruit officers, scrutiny in business planning, regular briefing arrangements)</li> <li>Design and test new systems and processes (i.e. key decisions, report templates, etc)</li> <li><i>[Report and document changes to government in the event of any L4 deeper devolution deal.]</i></li> </ul>
3	Application (Activity)	2025-26	<p>Build on structures, processes, systems, additional resources, and member training and experience established in Phase 2 to:</p> <ul style="list-style-type: none"> <li>Deepen level of outcomes-based scrutiny activity.</li> <li>Begin higher-profile evidence sessions and reviews.</li> <li>Expand working group and member activity, according to resource.</li> </ul>
4	Evaluation (Impact)	2026-27	<p>Independent/external review and evaluation to determine if:</p> <ul style="list-style-type: none"> <li>the goals of Phases 1-3 have been achieved.</li> <li>the Vision is making good progress,</li> <li>there is a demonstrable impact and outcomes in from Scrutiny work.</li> <li>how WYCA has benefited from scrutiny as an organisation.</li> </ul>
5	Consolidation (Results)	2027-28	<ul style="list-style-type: none"> <li>Make improvements and adjustments required by the Evaluation.</li> <li>Confirm the Vision has been implemented in full.</li> <li>Outline real impact of Scrutiny since 2024.</li> </ul>



## “Principle 0” – Committee structure

This is not a Key Principle, but acts as a “Principle 0” from which all the Key Principles flow; the structure is the core around which membership, processes, and resources must be built.

It is clear that the interconnection of policies across a number of portfolio areas and authorities across a larger geography makes MCA-level scrutiny fundamentally different to local authority scrutiny.

The Protocol *recommends* but does not *require* MCAs to have a single, overarching scrutiny committee and suggests Greater Manchester Combined Authority’s system as an example and suggests, at least, that all scrutiny members should be treated as a singular body or ‘scrutiny pool’.

The previous review of WYCA scrutiny arrangements in 2020/21 recommended arrangements very similar to the one ultimately adopted by Greater Manchester Combined Authority.

At the time, Scrutiny considered it prudent to retain one scrutiny committee, while the organisation adjusted to Mayoral working, and builds its resource and process base.

Ultimately, the Combined Authority opted for the current model of three ‘co-equal’ committees of 48 members, without an overarching committee, covering corporate, economy and transport/infrastructure issues primarily to:

1. Ensure that as many members as possible can be involved in WYCA scrutiny, in part, to ‘de-mystify’ the MCA in eyes of members and the public.
2. Ensure that Scrutiny can maintain an overview of all the new MCA’s activity and functions through separate groups of members.

### Assessment and conclusions:

The current system has advantages, and these are outlined throughout the report where it is recommended that they are retained, strengthened and built upon.

However, it has also presented numerous challenges directly linked to the number of committees, members and meetings – and the complicated nature of cross-cutting strategic MCA activity over a wider geographic area – compared to the level of resources available to support them.

- **Resourcing challenges** – scrutiny, governance, and the wider officer corps (which Scrutiny relies on for reports, information and analysis) spend a lot of time servicing the many committee meetings and members across the governance structure (not just scrutiny) – and even local authority scrutiny committees – leading to capacity struggles and gaps in member support.
- **Member availability and support** – a frequently changing membership each year, unable to dedicate enough time to the increasing demands of the role and attending meetings, with a complicated substitute system, leading to persistent quoracy issues (outlined below in Figure 2) when coupled with officer resourcing challenges, has meant members have not felt supported in their roles and the time they do dedicate is not actualised in terms of impact; many councils have struggled to appoint members to persistent vacancies.
- **‘Silo scrutiny’** – fragmented ‘silo working’ with committees looking at different issues from different points of view, keen not to step into each other’s remits, without a single

group with an overview of *all* activity to spot patterns and understand wider context. Remits have been shuffled numerous times but still leave unnecessary strategic gaps, no one has ‘ultimate authority’ and scrutiny members are not part of a single body where they would be briefed on all the authority’s work, as they are at *full council*.

- **Reactive, less strategic** – due to the thematic distribution and lack of central oversight, along with officer resourcing pressures, the committees end up reacting to the thematic committees chaired by WYCA’s portfolio holders and responding late to issues that have already emerged or progressed, rather than maintaining a pro-active strategic work programme – engaging in little pre-decision scrutiny.
- **Outcomes and impact** – Due to the aforementioned pressures and challenges, the committees have not been able to conduct reviews or produce reports as a direct outcome of their work, and any ‘soft’ recommendations have been difficult to both prove and track as evidence of Scrutiny’s impact; to date, no review has been completed by a scrutiny committee at the Combined Authority in the mayoral era.

**Figure 2 – Number of inquorate meetings due to low attendance**

Committee	Inquorate (Less than 11)	Nearly inquorate (11 present)	Barely quorate (12 present)	TOTAL w/ quoracy issues
Corporate	20%	10%	40%	30%
Economy	60%	10%	20%	70%
Transport	10%	40%	30%	50%

In summary, the current system suffers from severe resourcing difficulties and consequent member availability challenges which affect the level of integrated, strategic scrutiny which can optimally take place.

**Figure 3 – MCA structure comparisons**

MCA	LAs <sup>i</sup>	Cttees	Members	Call-in	Chairs <sup>ii</sup>	Meetings
West Yorkshire	5 (+1)	3 <sup>iii</sup>	48 (+ 5 subs) (16 per cttee)	5	3	12 (4 per cttee)
Greater Manchester	10	1	20 (+ 20 subs)	3	1 <sup>iv</sup>	10
West Midlands	7 (+11)	2 <sup>v</sup>	39 (15 + 24)	5	2	14 (7 per cttee)
South Yorkshire	4	1	10 (+10 subs)	5	1	4
Liverpool City Region	6	1	20	13	1	6
North of Tyne	3	1	9	4	1	4
Cambridgeshire-Peterborough	7	1	14	5	1	7
West of England	4	1	11	1	1	7
Tees Valley	5	1	15	5	1	5
North East	4	1	10 <sup>vi</sup>	4	1	3

<sup>i</sup> (Non-constituent councils in brackets)

<sup>ii</sup> All have deputy chairs apart from South Yorkshire.

<sup>iii</sup> Corporate, Economy + Transport Infrastructure

<sup>iv</sup> Elected at the first meeting.

<sup>v</sup> Overview & Scrutiny + Transport Delivery Scrutiny, who question the Mayor jointly.

<sup>vi</sup> 8 elected, 2 independent non-members who are Chair and Deputy Chair.

### Structure and number of committees

The Scrutiny Protocol recommends either a single committee model or an alternate multi-committee model in which all scrutiny members have oversight over all MCA activity as a single body or 'pool'.

All other MCAs have a single committee structure apart from the West Midlands, which has two scrutiny committees; one of which is a reconstituted version of their former ITA's 'legacy' Transport Committee.

There are three possible options for committee models open to the Combined Authority:

- Single committee option: a single overarching committee, which operates more like a select committee, with both permanent and temporary working groups to conduct many reviews and maintain comprehensive overview duties.
- Status quo: simply retaining the current three co-equal committee model as they currently operate without an overarching or joint body, with or without reforms to the remits, but with extra officer resource to support the system as a whole and more review work.
- Joint scrutiny: a retention of multiple committees in some form, that would also meet or be structured as a joint scrutiny body, i.e. an overarching committee w/ sub-committees, with increased officer resource to support the system as a whole and more review work.

The working group could not arrive at a consensus on which of these options should be recommended, citing concerns about WYCA's level of activity, Scrutiny's subsequent workload, the number of members involved in Scrutiny, and the level of officer resource needed to optimally support it all.

The working group, therefore, leaves the question of structure open but notes that a single committee might ultimately become the preference of the Combined Authority.

If so, it asks that the Combined Authority ensures:

1. Scrutiny is properly resourced whatever model is adopted
2. as many of the benefits of the current model are retained as possible
3. any single committee model does not reduce the amount of scrutiny work taking place, and that it utilises working groups and panels to supplement its formal committee meetings

### Select Committees and strategic scrutiny

The structure and size of Scrutiny is important, but *how* the scrutiny is conducted is equally, if not more, important.

There is a strong argument in favour of modeling MCA scrutiny along the lines of parliamentary select committees which scrutinise large government departments which cover a large geography and complicated, cross-cutting policy issues.

The government's expressed desire to see metro-mayors with "trailblazer" – or full single settlement funding – scrutinised by the region's MPs in select committee format is an expression that this is an appropriate way to scrutinise Mayors similarly to ministers.

**Recommendation 1:**

**The Combined Authority should:**

- a) **Consider whether to reconstitute scrutiny arrangements to consist of either:**
  - i. a single overarching ‘select committee style’ model, which operates mainly through temporary working groups and permanent sub-panels.
  - ii. a multiple committee model, with or without some capacity for overarching joint-scrutiny committee arrangements.
- b) **Evaluate, within a few years, the level of scrutiny work to determine if the chosen committee structure is still working.**
- c) **Ensure that whatever structure is chosen is appropriately resourced so that it can operate as intended.**

*Figure 4 – Suggested working groups for a single committee structure*

**West Yorkshire Scrutiny / Select Committee (*name to be confirmed*)**

**Overview – monitoring groups**

- KPIs and budget
- key decisions & project delivery
- portfolios, committees and directorate activity
- recommendations and the work programme
- stakeholder engagement

**Scrutiny review – task and finish groups**

- fact finding and answering questions
- reviewing / investigating issues
- making recommendations
- policy & strategy review
- call-in

## Key Principle 1 – A pool of members

**Assessment and conclusions**

- Scrutiny committees operate best when the members operate and feel like a close-knit and united team.
- Currently a member of one WYCA scrutiny committee can only call upon a member of another WYCA scrutiny committee from the same party and authority – which has proven complex.
- Members from bigger parties and authorities have more options, but short notice often makes them unavailable, leaving meetings inquorate.
- This system is necessary due to legal limitations only members formally co-opted onto the MCA being able to act as substitutes – due to requirements to declare disclosable pecuniary interests and receive a dispensation.
- The only alternative is to appoint one substitute per member, taking the total number of scrutiny members to 96 (48 x 2).
- Members are not routinely briefed on other scrutiny committees’ activity beyond work programmes being shared on agendas and meeting papers for the meetings they are substituting at.
- Due to availability reasons, briefings are usually conducted through email which are not a reliable way of keeping members informed of events.

### Recommendation 2:

The Combined Authority should consider, if a single committee model is adopted, reprofiling the role of “substitute” as a paid “deputy” for each appointed member, treated equally in terms of rights and information as a scrutiny member and permitted to be part of (and even lead) working groups, reviews and any other scrutiny work on behalf of their member or the committee.

## Key Principle 2 – Politically balanced membership

### Assessment and conclusions

- This is a legal requirement which WYCA meets and goes beyond by calculating political balance over the entire 48-person scrutiny membership, rather than on a per-committee basis, to ensure that as many parties are represented as possible which has included since 2021 the Green Party and a local Morley Borough Independents political group.

### Recommendation 3:

The Combined Authority should continue to calculate political balance across the entire pool of scrutiny members where possible as it does now, including substitutes if appointed, in order to ensure that scrutiny membership is as politically representative as possible.

## Key Principle 3 – Geographically balanced membership

### Assessment and conclusions

- This is a legal requirement which WYCA meets by appointing three members from each West Yorkshire constituent authority and one member from the non-constituent authority, York.
- Some councils have struggled more than others to find members to fill vacancies, sometimes leaving them – or substitute positions – vacant for long periods and even for the entire municipal year.
- WYCA scrutiny members should not see themselves as representatives of their council or their ward area, but as a single body representing the interests of West Yorkshire residents *as a whole*.
- Members should be supported to approach WYCA Scrutiny through a West Yorkshire wide, holistic, and strategic lens, instead of relying on the Ward-Member dynamic more established and understood at Local Authority level.

### Recommendation 4:

The Combined Authority should:

- a) Consider calculating geographic balance allocation similarly to political balance, by the number of councillors each authority has, to ensure that all positions are suitably appointed to, and membership is as geographically representative as possible.

- b) Support Members with regional-level data and information so that they are able to better consider matters brought before them through a WY-wide strategic lens.**
- c) Ask the constituent authorities to consider ‘place’ when appointing scrutiny members during the annual appointments process, to ensure that there is a good distribution between rural, urban and town representation.**

## Key Principle 4 – Appointing a chair

### Assessment and conclusions

- This is a legal requirement which WYCA meets by appointing both Chairs *and* Deputy Chairs only from parties different to the party of the incumbent Mayor (and previously, the Combined Authority Chair) – which since 2014 has been the Labour Party.
- WYCA is also the only MCA whose parliamentary Order includes three seats (including three substitutes, for a total of six) on its main Combined Authority board allocated to opposition “Balance Members” – currently two Conservatives and one Liberal Democrat.
- The Scrutiny Chairs are currently ‘informally’ chosen by these opposition “Balance Members” and mirror the same political proportions.
- This ensures that the Mayor and council leaders do not have a say in who Scrutiny Chairs are supporting their independence, but it is less clear what process or criteria is considered when Chairs and Deputies are selected by that group.
- The primary criteria for selecting the Scrutiny Chair should be their experience, knowledge and ability to perform their role in an independent and productive way.
- The Scrutiny Chair position should essentially be a ‘fuller time’ position exercised for multiple days a week to ensure that the Chair is able to dedicate the necessary amount of time to:
  - maintaining an effective parity with the Mayor
  - interfacing with officers more regularly and fully
  - maintaining an overview of all WYCA activity
  - directing scrutiny activity accordingly
- Other MCAs have different methods of appointing Scrutiny Chairs including allowing opposition members to elect one of their own and having an Independent Person as Chair and Vice Chair.
- WYCA’s (non-scrutiny) Transport Committee currently has two ‘fuller-time’ Deputy Chairs, each responsible for a strategic area (active travel and buses), to support the Transport Chair, who is a council leader, in their role.

### Recommendation 5:

#### The Combined Authority should:

- a) Consider the Chair’s role profile and how much time a Chair is required to dedicate to the role and how they are selected in terms of that role profile.**
- b) Ensure and protect the independence – and access to information and resources – of the Scrutiny Chair so that they are able to properly perform their duty to hold the Mayor, portfolio holders and MCA to account as a “check and balance”.**
- c) Consider, if a single committee model is adopted, appointing two enhanced Scrutiny Vice Chair positions to cover the strategic portfolios currently covered by the multiple scrutiny committees and lead panels and reviews in those areas.**

## Key Principle 5 – Sustained appointments made on interest and skills

### Assessment and conclusions

- The basis on which members are appointed by the constituent councils differs from authority to authority, political group to political group and member to member.
- No formal role profiles are currently used to aid political groups and members in determining the time demands of the role, ahead of selection.
- As a result, many members don't have enough time to dedicate to the role as needed on top of ward and council duties – and their full-time jobs.
- Remuneration is not enough to compensate them for a loss of income elsewhere to attend. This leads major quorum, availability and engagement challenges.
- It would be difficult for Councils to appoint members for more than one year at a time as they work to annual governance horizons set by elections.
- Some councils and groups struggle to appoint members at all, with a few persistent vacancies.
- Around half of scrutiny members appointed each year to WYCA scrutiny committees are new to both the Combine Authority as a whole and to Scrutiny.
- Even those with experience in local scrutiny do not have experience in the different form of scrutiny required in a regional context.
- Chairs have remained more consistent and so far, since 2021, only changed due to retirement or election loss rather than being replaced.
- This has allowed some sense of continuity, but committees are collectives that progress at the pace of the membership as a whole.

### Recommendation 6:

#### The Combined Authority should:

- a) Design and establish role profiles for all the membership roles serving on Scrutiny (i.e. “Chair”, “Vice Chair”, “Member” and “Deputy/Substitute”) to ensure that Members are clear on their duties and to encourage members to pursue scrutiny positions.**
- b) Consider appointing an “Independent Person” for a 4-year term to act as a long term, sustained link between different municipal years where membership may change too frequently.**
- c) Establish a formal and comprehensive “onboarding” programme for newly appointed members, alongside the Scrutiny Chair, to assess their level of experience / knowledge and expertise / interests, to determine the level of briefing and training they would need to fulfil the new enhanced role profiles.**
- d) Encourage constituent authorities to aim to, wherever possible, retain as many members as possible over multiple years, if there is no major change in political balance requiring a wholesale change in nominations.**
- e) Support constituent authorities in their appointments by maintaining attendance and engagement data to ensure that appointed members are either well supported to perform the duties required in the role profiles or can be replaced by a more suitable member in a timely manner if their circumstances change.**



## Key Principle 6 – Well-resourced training

### Assessment and conclusions

- WYCA currently supports over 150 members (including councillors, independent persons and private sector representatives) across its committee structure, not including ex officio sectoral representatives – which is larger than any single authority within the WY area.
- There is currently no specific dedicated budget, or internal officer capacity, for member training beyond the current, limited induction processes for new and returning members.
- Scrutiny, in the past, has attempted to issue new members with a “proforma” to audit their experience/knowledge level but the return rate was low.
- Relatively regular offline briefings are provided to Scrutiny Chairs – including ahead of the main CA meetings – but not members as a whole, with some exceptions for information provided during workshops (e.g. Budgets) and working groups.
- This means that scrutiny committee meetings themselves are often the place that members are briefed and informed on WYCA activity – and there are no pre-meetings due to limited member availability.

### Recommendation 7:

#### The Combined Authority should:

- a) Provide resource for training scrutiny members and chairs, according to the needs identified in their onboarding process and as new duties may require, and/or procure bespoke training materials to be later delivered by officers – including specific training needed to conduct reviews into specific topics, if required.**
- b) Draw upon the experience and expertise of existing members identified in the onboarding process to peer-train and mentor fellow members, as their time allows.**
- c) Maintain relationships with the “Local Government Association” (LGA) and the “Centre for Governance and Scrutiny” (CfGS) and draw upon any training or peer mentoring/review services they can provide, when available.**
- d) Consider expanding the reports briefings currently provided to Combined Authority board members before and after publication of Combined Authority meeting agendas, to all scrutiny members – divided, as now, by party or alternatively by council area.**

#### Scrutiny should:

- e) Make use of pre and/or post meeting briefings for scrutiny members to ask clarifying questions to officers on key issues and reports to avoid committee meeting time being used as de-facto briefings and to allow members to pursue more advanced lines of questioning in committee time.**

## Key Principle 7 – Inviting technical expertise

### Assessment and conclusions

- The Protocol highlighted WYCA’s Scrutiny <sup>432</sup> a case study under this Principle for inviting a local academic who had conducted some personal research into the Real Time



Information system, along with the internal operational manager at WYCA, to answer technical questions.

- On another occasion, the professional expertise of councillors was utilised to lead a member-member discussion on behavior change in transport.
- This represents an example of good scrutiny practice – the triangulation of evidence, beyond the usual officer-member interface.
- It is vital for good scrutiny and accountability that Scrutiny seek multiple points of view and sources of evidence beyond the political and corporate leadership that usually attend committee meetings.
- Sometimes it is more appropriate and valuable to speak to operational managers and internal expert analysts directly, or sense check assumptions and facts through external non-MCA expertise.
- However, despite the Protocol highlighting this as a case study, this was in fact a relative exception to 'business as usual' scrutiny.
- The other occurrence of Scrutiny using external experts to feed into the scrutiny process was in 2019/20 in when two different working groups conducted views into:
  - business grants programmes – speaking to consultants and businesses directly on their experience – and;
  - WYCA's response to the climate emergency – speaking to local academics, pressure groups, and green sector businesses.
- This also reinforces the value that working groups have in the scrutiny process, in that it is easier to engage with experts through them than at committee meetings.
- Scrutiny does not currently have, or have access to, a budget to hire consultants to provide evidence or advice – although, as during the business grants review, Scrutiny independently engaged with consultants already hired by WYCA to evaluate the business grants programmes.

#### **Recommendation 8:**

##### **The Combined Authority should:**

- a) Make available to Scrutiny its own network of external experts and stakeholders used during consultation exercises, in other policy and strategy development, and any consultants contracted to review or evaluate any MCA activity.**
- b) Ensure that Scrutiny continues to have equal access to internal officer experts, who have specific expertise in key policy areas and functions.**
- c) Provide, or share existing, resources to deliver bespoke briefings from experts to members related to topics or reviews they are looking at, as and when required.**

##### **Scrutiny should:**

- d) Consider, during work programming, what information and data they need and from what source, in order to identify external sources to triangulate internally sourced testimony with.**
- e) Build its own network of expert contacts, either independently or in coordination with other officers and committees' private sector, independent and/or ex-officio sector representatives.**
- f) Engage in greater use of evidence gathering sessions, working groups and offline workshops, to allow experts to be more 'candid' and provide sensitive but vital background information which can be taken into account in the rest of the public scrutiny process.**

## Key Principle 8 – Remuneration and status

### Assessment and conclusions

- WYCA pays allowances to scrutiny members through the general powers function provided in the WYCA Order, including additional allowances to chairs and deputies, on the advice of an IRP. However, allowances were significantly reduced in 2021 due to the increase in committees and members.
- Councillors are not full-time positions but part-time roles, which must be fulfilled in addition to full-time ‘day jobs’, wherein members often must take time off from work to fulfil council duties. Adding MCA duties on top of council duties means WYCA ultimately receives members ‘part-time of part-time’.
- Scrutiny work is demanding and does not only consist of attending committee meetings but building knowledge and skills through briefings and training, maintaining a constant overview of a large base of complicated cross-cutting activity across a large geography and multiple partners, and then having enough data and information to properly scrutinise, review and recommend, and challenge high profile programmes and leaders.
- Scrutiny will always need to draw upon the time and expertise of officers for most of the scrutiny process including reports and meeting attendance, especially senior officers – which poses a major capacity conflict as officers must balance commitments to scrutiny against commitments to other committees, the Mayor and portfolio holders and actually delivering in their ‘day jobs’.
- Due to the reality that, without London Assembly style full-time elected members and substantial assembly resources and the lack of wider member / political support that members have access to at their authorities, scrutiny members will always struggle for availability and rely disproportionately more on scrutiny support officers.
- In particular, members need a greater amount of direct scrutiny advice, which has not been as forthcoming as needed. MCA scrutiny officers must necessarily take on the brunt of the ‘overview’ role and be able to read, summarise and analyse a large number of papers produced by other officers and then draw out the key areas for closer scrutiny, based on parameters and focuses set by scrutiny members during work programming.
- It may be necessary sometimes for scrutiny officers to act as proxies for scrutiny members and pursue lines of questioning and answers on their behalf, especially in preliminary or follow up stages.
- Scrutiny currently has two support officers, out of the three theorised as needed during the 2021 review, who are the sole support to all scrutiny chairs and members including all administrative, committee secretariat, and general member support.

### Recommendation 9:

#### The Combined Authority should:

- a) Convene an IRP to review scrutiny allowances against role profiles and duties expected of Scrutiny, taking into account vital non-committee meeting work (such as working groups, evidence gathering, and drafting reports) to ensure members are able to give up work and council commitments to dedicate more time to WYCA Scrutiny.**
- b) Ensure that Scrutiny Members are not treated, however unintentionally, differently to ‘executive members’ such as the Mayor and CA Members or seen as ‘externals’; they must be given equal access to organisational personnel and resources, including genuinely impartial advice from all officers on all matters.**

- c) **Ensure scrutiny activity is taken into account more widely in the business plans of the service areas which will engage with Scrutiny most often, including but not limited to: policy and strategy, member and committee support, research and intelligence, project appraisal and delivery, communications and marketing, and senior management.**
- d) **Consider appointing additional scrutiny officers and/or reprofiling job descriptions, as suggested during the previous review period in 2020/21, to ensure that Scrutiny Members are thoroughly supported in all overview, scrutiny and corporate duties as necessary – in particular, direct scrutiny advice.**

## **Key Principle 9 – Holding the mayor or directly elected leader and the institution to account**

### **Assessment and conclusions**

- Public scrutiny should focus on public accountability and the accountable leadership should appear at Scrutiny more often.
- While it is appropriate to question operational-level officers on details in working group format or in briefings, public questioning should be directed at political (Mayor, Leader) and corporate (Head of Service upwards) decision-makers on the decisions they are making and why – and hold them to account for the performance of their areas of responsibility.
- The Mayor has always attended scrutiny committee meetings – or meetings with Scrutiny Chairs and other Members – when asked and has made sure to rearrange when a diary clash emerged.
- Portfolio Holders do not attend Scrutiny as a matter of course to present on areas of responsibility, but the Transport Chair does meet relatively regularly with the Transport Scrutiny Chair.
- Currently, each scrutiny committee dedicates one of their four meetings per year to a “Mayors Questions” session where the Mayor attends to answer the committee’s questions for the whole duration – based on a very open format which allows members to ‘control’ the agenda and ask any question related to their committee’s remits. The sessions are received well by members but there has been some debate as to the exact format.
- Scrutiny Chairs do not have a standing invitation to the main Combined Authority board meetings – or any other relevant committee, such as Transport.

### **Recommendation 10:**

#### **The Combined Authority should:**

- a) **Revisit the format of Mayor’s Questions including, but not limited to: the length of the sessions, how frequently the Mayor should attend, whether they should submit a formal “Mayor’s Report”, whether “Mayors Questions” should be arranged outside of committee meetings as a separate public session, and whether Portfolio Holders could also participate.**
- b) **Consider how the Portfolio Holders can better engage with the Scrutiny process on areas within their portfolio’s area of responsibility including attending meetings and engaging with any Scrutiny Member selected to shadow their portfolio.**

- c) **Extend a standing invite to the Scrutiny Chair(s) to attend the main Combined Authority board meetings – including exempt items – to represent Scrutiny’s view during decision-making.**
- d) **Consider extending standing invitations to relevant Scrutiny Members to attend other committees relevant to their scrutiny duties e.g. any scrutiny portfolio or working group leads, which have been appointed, attending the relevant committee (i.e. Transport Committee).**

## Key Principle 10 – Participation in pre-policy and pre-decision scrutiny

### Assessment and conclusions

- The level of pre-decision Scrutiny at WYCA consists of a mixed picture – but Scrutiny does not contribute to ALL major policy and strategy development as the Protocol suggests.
- In some cases, it does happen, and officers look to bring some strategies to Scrutiny early in the process to inform ‘high level’ thinking and discuss the overall narrative and approach, as has happened this municipal year (2023-24) e.g. Economy Strategy, Assurance Framework and Local Transport Plan 4 – at Economy, Corporate and Transport Scrutiny respectively.
- It is not entirely clear if Scrutiny’s input is highlighted to the decision-makers or simply incorporated into the final document. In any case, it has been difficult to track the impact of scrutiny as a result.
- In other cases, some major decisions and strategies are not taken to Scrutiny at all pre-decision due to either unfortunate oversight by both the scrutiny and officer side, or scheduling issues e.g. bus reform and mass transit decisions in late 2023.
- There is some conflict that arises due to the thematic committees, which are chaired by the Council Leaders who each hold a portfolio and have many independent or private sector members on them, performing the policy and strategy development role and engaging in ‘lower case s’ scrutiny type role.
- Scrutiny is often told it cannot see a strategy, review or decision if it has not been to another committee or political leadership first – but often if it has gone to another committee, it may be too late to make an impact; there are limited meetings of both scrutiny and non-scrutiny committees.
- There is a view that policy development should remain a duty of the thematic/portfolio committees, and scrutiny should provide ‘devil’s advocate’ challenge and monitor achievement on overall strategic goals, instead of straying into making ‘policy by proxy’.
- A Forward Plan of Key decisions is published as legally required but where decisions are withdrawn or there is a change in decision date or decision-maker, Members are either not informed, or the number of changes invites confusion.
- Forward plans of non-key decisions e.g. policy/strategy discussions, updates, reviews for the other committees are not published as a matter of course, and there is no ‘central forward plan’.
- Scrutiny has not to date focused formally on Value for Money assessments – with the type of scrutiny done more ‘high level’ and qualitative than methodical or quantitative.

## Recommendation 11:

### The Combined Authority should:

- a) Identify certain decisions as being ‘major strategic decisions’ (MSDs) – separate from the statutory ‘Key Decision’ system – that Scrutiny should scrutinise and challenge before final decision; and the final report of which should include a section outlining scrutiny’s comments and recommendations.
- b) Be flexible in allowing Scrutiny to feed into reviews, policy / strategy development and service reform early in the development cycle in the most appropriate method, if an early draft is approved by the relevant Portfolio Holder for scrutiny – and/or by allowing Scrutiny members to attend other committees if they occur before the nearest scrutiny committees.
- c) Maintain and make available to Scrutiny up-to-date forward agenda plans for all committees so that Scrutiny is aware of upcoming decisions, discussions, reviews and other pertinent items – and not just ‘Key Decisions’.
- d) Reconsider the terms of reference, or operating practice, of the thematic committees to ensure that, just as Scrutiny should not make policy, thematic policy committees should not ‘mark their own homework’ through self-scrutiny.

### Scrutiny should:

- e) Avoid a formal role in policy making and instead focus on challenging, as ‘Devil’s Advocates’, the assumptions and logic behind policy directions and strategic visions to ensure that process has been followed and all viewpoints and data points have been taken into account.
- f) Consider “Value for Money” (VfM) methodology and assessments more often during overview and scrutiny.

## Key Principle 11 – Provision to call in

### Assessment and conclusions

- This is a legal requirement which WYCA fulfills through the “call-in” process as outlined in the Scrutiny Standing Orders, but the law allows a lot of leeway in how this process is administered and fulfilled.
- Only Scrutiny members, formally co-opted onto WYCA scrutiny committees may call-in decisions; at least 5 members (out of 48), including at least one from two different WY councils.
- CA members and Transport Committee members may not call-in decisions they are able to vote in at their committees. Councillors not co-opted onto WYCA scrutiny committees may not participate in the call-in process, except to lobby scrutiny members.
- To date, no decision of the Mayor, an officer or decision-making committee has been called in during the mayoral era (2021 onwards) but attempts to do so did reveal some issues around the current process e.g. the definition of day for the deadlines, whether it is the scrutiny officer or Chair that directs the delay of a decision, and what to do when either the scrutiny, or subsequent decision-making, committee is inquorate. These issues should be ironed out.
- Call-in represents a ‘nuclear option’ when all other options have been exhausted and a failure of scrutiny or decision-making has taken place. If Scrutiny is suitably briefed, kept

in the loop and given opportunity to input into key decisions or sensitive projects at earlier stages, then call-in becomes less likely and unnecessary.

- Processes around Key Decision management could be improved so that it is clearer to Scrutiny Members what KDs are going or not. E.g. some KDs decision dates and decision makers are constantly changed without clarification, making it more difficult for Members to track their progress.
- There is currently a gap with regards to Key Decisions that are exempt items and decided in private. The Scrutiny Chairs are permitted to see exempt items and reports, but the wider membership cannot – making it impossible to scrutinise.

#### **Recommendation 12:**

**The Combined Authority should:**

- a) Consider what best practice of the call-in processes of the constituent authorities and other MCAs could be adopted to strengthen WYCA's call-in process.**
- b) Ensure that Key Decision definitions, information and processes are clearer between officers and Members, so that it is clear what decision is being taken, the general level of spending that will take place, who is making the decision and when, and why there are any changes – including a provision for scrutiny of exempt items in an appropriate way.**

## **Key Principle 12 – Regular performance monitoring including agreed outcomes**

#### **Assessment and conclusions**

- It is vital that KPI and other relevant data is monitored consistently, closely and long-term so that proper context can be established, and patterns noticed.
- Early warning and intervention is often vital to avoiding bigger problems down the line and this can only be done with long-term, close monitoring.
- Scrutiny does not currently regularly monitor overall KPIs as a matter of course – partly due to the split of remits between three committees.
- When KPIs have been to committee, they are usually only the ones linked to the item being discussed.
- When committees have looked at general KPIs, they tended to stray towards another committee's remit due to the inherent cross-cutting nature of an MCA's activity.
- KPI data is not considered by Scrutiny at the beginning of the year, nor is it adjusted mid-year based on KPI data.

#### **Recommendation 13:**

**The Combined Authority should:**

- a) Provide Scrutiny with the latest performance data at the beginning of the municipal year, alongside committee forward plans and the usual corporate / strategic plans, so that Scrutiny can identify topics for the work programme.**
- b) Provide Scrutiny with monthly and quarterly KPI data, in a format suitable to Scrutiny's needs (i.e. emphasising narrative of RAG ratings and comparing historic data and future projections), for regular monitoring.**



## Key Principle 13 – Robust work programming

### Assessment and conclusions

- There is usually a process-driven approach to work programming, which is done informally at the beginning of the municipal year and involves multiple discussions with senior officers – but this differs in depth, year to year.
- The process is focused on allowing all members to raise issues of interest and concern for them, and then amalgamating the different suggestions into topic areas and lines of enquiry that make sense – so that all members feel ownership of the work programme.
- The Mayor, CA members and the public are not usually involved in the work programming stage.
- The work programme is reviewed and amended at every meeting and Chairs usually have leeway to amend it in between meetings as needed.
- Communication about upcoming issues and decisions is not always timely to allow scrutiny to amend the work programme as needed.
- Due to the sheer amount of activity, and the ‘multiplication factor’ in that WYCA activity covers the entire WY geography and all constituent councils, it is arguably impossible for Scrutiny to cover all activity if it takes a reactive approach i.e. trying to comment on and scrutinise all decisions, projects, and items.
- It is more prudent for Scrutiny to determine a criteria and priority system to filter WYCA activity through during the overview stage to be more selective in what is escalated to direct scrutiny.
- The type of scrutiny that takes place at MCA level is necessarily different from that which takes place at local authority level due to the different nature of MCAs as fundamentally strategic, partnership bodies created to consider cross-cutting issues across larger geographies.
- The type of scrutiny by WYCA’s Scrutiny must mirror the type of organisation that WYCA is – that is, strategic scrutiny of a strategic organisation.

### Recommendation 14:

#### The Combined Authority should:

- a) **Ensure that political and corporate leadership keep Scrutiny in the loop on the topics selected for the work programme so that timely scrutiny can take place and notify Scrutiny when issues not considered at work programming stage emerge.**
- b) **Include reports from the Mayor, portfolio holders and directors outlining the major issues and decisions expected that year and suggesting possible areas of challenge or interest that would benefit from scrutiny during the work programme stage.**
- c) **Provide communications resource (i.e. advice, YourVoice, social media etc) to allow Scrutiny to consider views and suggestions from the public, community groups, businesses, and non-WYCA members for the work programme – as part of a consultation-style approach.**
- d) **Include an end-of-year “wrap up report” where officers summarise the MCA’s response to the various actions, suggestions and recommendations made throughout the year – to be a key part of the following year’s work programming.**

**Scrutiny should:**

- e) **Ensure that the work programme topics and approach to overview are suitably strategic to properly mirror the Combined Authority's nature and type of activity.**
- f) **Review the work programme at the mid-year point to ensure that any new issues are considered, and the work programme is as live as possible.**

## **Key Principle 14 – Focused task and finish exercises**

### **Assessment and conclusions**

- Smaller working groups of members, working on a directive from the main committee with a time limit and without the bureaucratic formalities of committee, have proven to be the most effective way of scrutinising and reviewing fast moving and complicated issues.
- WYCA is inexperienced in utilising Scrutiny to lead reviews. Scrutiny has not engaged in many task and finish reviews in the mayoral era, largely due to lack of resource and member availability, with the first two such reviews taking place this year;
  - this two-session review of the Scrutiny Protocol and
  - a single-session spotlight review of the cancelled FlexiBus scheme.
- Other working groups established have been informal 'overview' groups without end dates.
- There is a 'Catch-22' in that there is little value in pursuing a review of a topic that is already being looked at by another committee or body, and would therefore duplicate efforts and use up officer resource, and at the same time, pursuing a topic that WYCA is not currently working on, would require a large amount of officer resource which, if available, would likely have already been deployed in tackling that same issue.

### **Recommendation 15:**

#### **The Combined Authority should:**

- a) **Ensure Scrutiny has the resource to conduct a much greater number of in-depth reviews per year on cross-cutting, strategic topics that will add genuine value to WYCA's objectives and/or resolve persistent strategic challenges WYCA, or the region, faces.**
- b) **Involve scrutiny more closely in other reviews – internal or external – to seek their input, seek some needed challenge, or as part of a triangulation of evidence.**

## **Key Principle 15 – Strong relationships with stakeholders**

### **Assessment and conclusions**

- There are currently no formal links between WYCA Scrutiny and constituent authority scrutiny committees, beyond the inevitable overlap in membership.
- There have been no instances of formal joint scrutiny by WYCA and local scrutiny of joint services, stakeholders or areas of interest.



- There is also little knowledge of or uptake of WYCA's constitutional provisions that allow any elected Member in West Yorkshire to formally refer matters to WYCA Scrutiny and receive a response.
- There is a large degree of duplication when local scrutiny committees scrutinise WYCA activity and officers directly, including the Mayor who regularly attends full council meetings across the region.
- This creates a large demand on WYCA officers' time and resources that then cannot be made available to WYCA Scrutiny, limiting its ability to fulfil its duties.
- Discussions on 'scrutiny taking place in the right place' have been debated throughout the years by members.
- On the one hand, WYCA activity affects local authority areas and activity and is a legitimate object of scrutiny by councillors – especially those not on WYCA scrutiny committees.
- The opposing view is that scrutiny of WYCA activity should be conducted by WYCA Scrutiny, and that local scrutiny members should direct their scrutiny of what their area receives from WYCA to their authorities' political and corporate leadership.
- Most of WYCA's projects and schemes are local council schemes promoted and delivered by local councils but only funded and assessed by WYCA. There is a discussion to be had about whether scrutiny of certain WYCA projects is most effective by WYCA Scrutiny or by members in that council.
- Attempts to establish a WY-wide scrutiny officers and WY scrutiny chairs network groups have been attempted a few times but are not sustained due to resourcing issues.
- Scrutiny does not currently have communications and marketing resources or activity, beyond webcasting meetings and a relatively buried section on the WYCA website.
- There is little promotion of Scrutiny activity and no press releases of work programmes, meetings or post-meeting readouts with member statements; even Mayor's Questions does not yield much attention.
- Public engagement could be vastly improved. The public rarely attend scrutiny committee meetings, with the exception of a few environmental campaign groups throughout the years, and webcasting view count is very low as meetings take place during the working day.

### **Recommendation 16:**

#### **The Combined Authority should:**

- a) Agree a formal 'WY-level scrutiny protocol' between partner authorities establishing 'rules of engagement' on who has responsibility for scrutinising which elements and how joint scrutiny and referrals would work on areas of mutual interest, to ensure that the most effective scrutiny is taking place and duplication is avoided.**
- b) Enable greater liaison between WY scrutiny officers and WY scrutiny chairs through an established WY scrutiny network to share work programmes, best practice, relevant updates as well as manage duplication, joint work and referrals.**
- c) Establish a committed communications plan and schedule to promote and publicise Scrutiny activity and build Scrutiny's profile including promotion of work programming, meetings, evidence sessions, reviews, recommendations, and Mayor's Questions – so there is greater parity between Scrutiny and CA Members and so that the public is more aware of, and engaged in, the Scrutiny process (i.e. to submit evidence in writing or verbally).**

## Key Principle 16 – Regular self-evaluation and reflection

### Assessment and conclusions

- Members are able to discuss and amend the work programme at every meeting but the standing item is at the end of the agenda when time is tighter and often does not invite comment.
- A factual, minutes-focused annual report is published every year by officers in the ‘inter-election’ period between May-June.
- It is vital that Scrutiny is not, and is not perceived as, a ‘talking shop’ but makes a genuine impact and helps drive improvements and outcomes across WYCA and the region.
- Members and officers time is valuable and neither want to participate in a process that is not productive and has clear, observable and actionable outcomes they can clearly point to as a product of the hard work they will put it.
- Scrutiny, as a function, has only been evaluated once in 2020/21 ahead of the first mayoral election and Scrutiny’s recommendations (to retain a single committee and move to working group focused work) were not adopted by the Combined Authority board at the time.

### Recommendation 17:

#### The Combined Authority should:

- a) **Commit to more regular mini-reviews of Scrutiny (and wider governance) to ensure the system is productive, contributing to outcomes and working most efficiently – including with independent, external reviewers at appropriate times.**

#### Scrutiny should:

- b) **Re-orientate the annual report to focus on outcomes and impact of Scrutiny and be discussed by members in draft form at the end of the year and approved at the beginning of each municipal year.**
- c) **Hold post-committee ‘wrap ups’ so members can review the meeting and its conclusions more honestly and amend the work programme accordingly.**
- d) **Hold bi-annual ‘wrap up’ meetings to review and discuss the direction of the work programme.**

## Key Principle 17 – Access to data, research, and analysis

### Assessment and conclusions

- The proposed “Oflog” (Office for Local Government) has not yet been established, and there hasn’t been as much external public analysis of MCAs as there is of local authorities.
- Scrutiny could make greater use of existing LGA data on authorities within the WYCA area and pay more attention to reviews conducted by external consultants on WYCA,

including internal corporate matters such as the analysis of the leadership structure conducted in 2021/22 as part of the mayoral readiness agenda – amongst others.

**Recommendation 18:**

**The Combined Authority should:**

- a) Use Oflog’s data frequently in its work programming and overview duties, as part of a triangulation of data, when OfLog is established.
- b) Notify Scrutiny when external analysis of WYCA is taking place and of any data that is generated as a result.

## **Key Principle 18 – Strong relationship with audit committees**

**Assessment and conclusions**

- There are many ways Scrutiny and Audit can work in a complimentary way while not treading on each other’s remit, through agreed ‘rules of engagement’ and frequent contact between Chairs.
- The current Audit Chair and Corporate Scrutiny Chair have met more frequently than their counterparts have met in the past, leading to the planning of joint workshops on areas of mutual interest, such as risk management, and the Audit Chair participating in this review of the Scrutiny Protocol.
- This Principle also includes recommendations for audit committees to have more ‘Scrutiny-style’ dedicated officer resource to produce annual reports on their work, amongst other things.

**Recommendation 19:**

**The Combined Authority should:**

- a) Conduct an Audit-led review of the audit committee to ensure that it fulfills the requirements outlined in the Scrutiny Protocol including consideration of:
  - i. providing a dedicated resource to support the Audit Chair in producing annual reports on their work.
  - ii. reviewing membership of the audit committee to explore participation of non-executive councillors, similarly to other MCAs.

**Scrutiny should:**

- b) Arrange regular meetings between the Scrutiny and Audit Chairs so that they can agree ways of working to allow them to refer matters of concern, including reports and recommendations, to each other’s committees according to their defined duties.

## Additional Principle – [Public] Mayor’s Question Time

### Assessment and conclusions

- WYCA has now begun public Mayors Question Time sessions which are ‘town hall’ style events, moderated by local journalists and/or businesspeople, where the public can ask the Mayor any question.
- The first three sessions were 25 January in Wakefield), 5 February in Halifax and 22 February in Leeds – with more planned in the near future.
- This required Scrutiny to ‘rebrand’ its own mayoral question sessions, previously also known as Mayors Question Time – and now known as Mayors Questions.

### Recommendation 20:

**The Combined Authority should continue to host regular public Mayors Question Times and ensure they are as accessible as possible to the public – including live casting if resources allow – and are suitably challenging and independently moderated.**

## Background documents

### Scrutiny Protocol for English Institutions with Devolved Powers

<https://www.gov.uk/government/publications/scrutiny-protocol-for-english-institutions-with-devolved-powers>

### English Devolution Accountability Framework

<https://www.gov.uk/government/publications/english-devolution-accountability-framework>

### Technical Paper on Level 4 Devolution

<https://www.gov.uk/government/publications/technical-paper-on-level-4-devolution-framework>

### Combined Authority's Letter to the government formally applying for devolution – “The Asks”

<https://westyorkshire.moderngov.co.uk/documents/b3998/Supplementary%20Appendix%203%20to%20item%207%2001st-Feb-2024%2011.00%20West%20Yorkshire%20Combined%20Authority.pdf?T=9>

### Review of WYCA Scrutiny Arrangements 2020/21

<https://westyorkshire.moderngov.co.uk/ieListDocuments.aspx?CId=135&MId=945&Ver=4>

### Outcome of the review of WYCA scrutiny arrangements 2020/21 (Minutes of 9 March 2021 WYCA meeting)

<https://westyorkshire.moderngov.co.uk/ieListDocuments.aspx?CId=133&MId=1070&Ver=4>

### Independent Review of Greater Manchester Scrutiny arrangements 2022

<https://democracy.greatermanchester-ca.gov.uk/documents/s21088/4%20Final%20GMCA%20scrutiny%20report%202022.pdf>

### CfGS Evaluation of Greater Manchester Scrutiny arrangements 2023

<https://democracy.greatermanchester-ca.gov.uk/documents/s27974/Appendix%20A%20-%20Scrutiny%20evaluation%20report.pdf>

### West Midlands IRP's review of scrutiny allowances June 2023

<https://governance.wmca.org.uk/documents/s10527/Report%20of%20the%20Independent%20Remuneration%20Panel.pdf>

<https://governance.wmca.org.uk/documents/s10528/Enc.%201%20for%20Report%20of%20the%20Independent%20Remuneration%20Panel.pdf>

### West Midlands review of Transport Committee governance June 2023

<https://governance.wmca.org.uk/documents/s10525/Transport%20Governance%20Review%20Report.pdf>

<https://governance.wmca.org.uk/documents/s10526/Enc.%201%20for%20Transport%20Governance%20Review.pdf>



**Find out more**  
[westyorks-ca.gov.uk](https://westyorks-ca.gov.uk)

**West Yorkshire Combined Authority**

Wellington House  
40-50 Wellington Street  
Leeds  
LS1 2DE



**West  
Yorkshire  
Combined  
Authority**

**Tracy  
Brabin  
Mayor of  
West Yorkshire**

## DRAFT Scrutiny Vision and Plan

**Scrutiny Vision:** Long term strategic vision to be achieved by 2028 (by the 3<sup>rd</sup> Mayoral election) with significant progress by 2025/26 under deeper devolution.

**Scrutiny Plan:** Short/medium term implementation plans to implement the Vision to be overseen jointly by Scrutiny and the Combined Authority on an annual basis.

### Combined Authority DRAFT Scrutiny Vision 2028

Summary – Scrutiny Vision 2028	
<b>Ambition</b>	<p>The Scrutiny Vision aims to position the Combined Authority’s Scrutiny function to:</p> <ul style="list-style-type: none"> <li>• Go above and beyond the Scrutiny Protocol and best practice.</li> <li>• Determine a unique approach suited to the unique needs of regional, strategic scrutiny in West Yorkshire, compared to local authority-level scrutiny or MCA scrutiny elsewhere.</li> <li>• Support the CA’s fundamental strategic purpose, defend the interests of the organisation with regards to its functions and consider the needs of all WY residents it serves.</li> <li>• Foster and sustain an organisational culture where scrutiny and challenge is welcomed, independent, and impactful – not an ‘afterthought’ or ‘box-ticking exercise’.</li> <li>• Be demonstrably outcomes-focused, like any other core corporate service, which can prove the impact it makes on a regular basis – and that it is not a ‘talking shop’.</li> </ul>
<b>Role</b>	<p>To directly advise, scrutinise and hold the Mayor and Combined Authority to account in public and private.</p> <p>To have a unique role and purpose, not conducted by other committees, focused on providing serious challenge to identify, monitor and resolve ‘persistent strategic challenges’ by:</p> <ul style="list-style-type: none"> <li>• <u>Enabling</u> – through supporting (but not <i>leading</i>) <ul style="list-style-type: none"> <li>○ policy development</li> <li>○ service improvement</li> <li>○ programme delivery</li> </ul> </li> <li>• <u>Protecting</u> – through monitoring <ul style="list-style-type: none"> <li>○ activity, risks and performance</li> <li>○ studying data and information</li> <li>○ maintaining accountability</li> </ul> </li> <li>• <u>Investigating</u> persistent issues.</li> </ul>

	<p>A wide Terms of Reference which clearly outlines Scrutiny's powers and responsibilities, to provide maximum manoeuvrability and oversight.</p> <p>Strictly non-parochial and non-partisan – having a holistic, strategic focus which considers the Combined Authority's and West Yorkshire's interests.</p> <p>An understanding with local authority scrutiny functions on rules of engagement in scrutinising cross-cutting areas, including formal referral and joint scrutiny arrangements.</p>
<p><b>Structure</b></p>	<p><b>A single overarching, strategic scrutiny committee</b> supported member-led panels / working groups able to operate more flexibly and with greater focus.</p> <p><u>Permanent</u> working groups ('panels') to focus on <i>overview</i> duties monitoring activity and advising the committee on:</p> <ul style="list-style-type: none"> <li>• KPIs and budget</li> <li>• key decisions &amp; project delivery</li> <li>• portfolio, thematic committee and directorate activity</li> <li>• recommendation tracking and work programming</li> <li>• public &amp; democratic (member) engagement</li> </ul> <p><u>Temporary</u> working groups ('task and finish') to focus on <i>scrutiny</i> duties and report back to committee by:</p> <ul style="list-style-type: none"> <li>• fact finding and answering questions</li> <li>• reviewing and investigating issues and decisions</li> <li>• making recommendations</li> <li>• reviewing and challenging policy &amp; strategy</li> <li>• managing call-in</li> </ul>
<p><b>Membership</b></p>	<p>Politically and geographically proportionate membership; calculated across both members and deputies (substitutes) to ensure maximum representation in terms of parties and place.</p> <p>A 'fuller-time' Chair able to dedicate time to maintaining a comprehensive overview of CA activity and maintain a degree of parity in officer interface and profile.</p> <p>Independent Member(s) recruited, as required, for longer terms to maintain continuity over many years and provide particular expertise.</p> <p>Two Vice Chairs, each overseeing a strategic portfolio (i.e. economy or infrastructure), managing a pool of trained, well-supported Members appointed for multi-year terms, who each oversee their own portfolio and working groups as a team.</p>



## Duties

Enhanced, detailed role profiles clearly outlining each Member's responsibilities, will be maintained and regularly reviewed.

The roles:

- Chair x 1: Overall Lead
- Vice Chairs x 2: Strategic Leads (*possibly: Infrastructure and Economy*)
- Members: Portfolio / Working Group Leads
- Deputies (formerly substitutes): Assistant Portfolio / Working Group Leads (as appropriate)
- Independent Member(s)

1 x Chair ('Overall Lead') is expected to:

- Manage all committee meetings and agendas
- Oversee overall MCA strategy, WY Plan and activity
- Oversee corporate issues, assets and services
- Manage Vice Chairs and other leads
- Shadow the Mayor
- Interface regularly with officers internally

2 x Vice Chairs ('Strategic Leads') are expected to:

- Support the Chair and deputise as required
- Manage/Chair all relevant meetings within scrutiny of their strategic portfolio area
- Act as a 'strategic portfolio lead' and oversee multiple portfolio areas under strategic categories, e.g. *possibly*
  - *Economy (Business, Skills, Culture portfolios)*
  - *Infrastructure (Transport, Environment, Place portfolios)*
- Manage 'portfolio leads' within their strategic portfolio
- Shadow appropriate strategic chairs *i.e. the Transport Committee and Business Board chairs*

TBC x Members ('Portfolio Leads') are expected to:

- Attend all meetings or send their Deputy
- Brief and keep their Deputy in the loop on their portfolio
- Act as a portfolio lead – maintaining a watching brief over activity in their portfolio area, attend relevant meetings, take relevant briefings, and lead updates and questioning on that area
- Chair working groups and reviews as required

TBC x Deputy Members/Substitutes ('Assistant Portfolio Lead') are expected to:

- Attend all meetings as required with, or on behalf of, their Member
- Keep in the loop on all matters related to their portfolio
- Act as a deputy portfolio lead – maintaining a watching brief over activity in their portfolio area, attend relevant meetings, take relevant briefings, and lead updates and

	<p>questioning on that area, and advice their Member on anything of note</p> <ul style="list-style-type: none"> <li>• Chair working groups and reviews as required</li> </ul>
<p><b>Support</b></p>	<p>To perform enhanced duties, Members will be provided with:</p> <ul style="list-style-type: none"> <li>• Onboarding and induction at the beginning of the year, with frequent in-year follow up.</li> <li>• Training, development and ‘360 performance review’ throughout the year, as required.</li> <li>• Engagement through regular 1-1s and catch ups.</li> <li>• Summaries, analysis and advice on lines of questioning in advance of meetings to ensure productive, strategic scrutiny.</li> <li>• Direct access to relevant information, members, officers and meetings, as required (i.e. Key Decisions, agenda forward plans, reports/committee papers, media scanning, briefing notes) at an equal level to ‘Executive’ members.</li> <li>• Appropriate allowance level and travel expenses commensurate with new enhanced duties, which allow members to take enough time of work and council duties to fulfil.</li> </ul> <p>Scrutiny will be well resourced and supported by a dedicated professional service of scrutiny support officers able to provide independent overview, scrutiny, research, review, analysis, and advice duties, overseen by the statutory scrutiny officer.</p>
<p><b>Meetings</b></p>	<p>An appropriate number of full committee meetings per year supplemented with regular meetings of panels, working groups, workshops, briefings and director / portfolio holder catch ups – as required.</p> <p>Public committee meetings have two purposes/outcomes:</p> <ul style="list-style-type: none"> <li>• Document accountability – challenge and ‘shine a light’</li> <li>• Manage recommendations – drive and monitor improvement</li> </ul> <p>These outcomes will be primarily pursued in two formats:</p> <ol style="list-style-type: none"> <li>1. Inward (member-member interface): members reporting on their inter-meeting overview and scrutiny duties and agreeing formal recommendations and actions with each other</li> <li>2. Outward (member-witness interface): members questioning relevant witnesses (politicians, experts, public, officers) on overarching strategic themes and challenges to build evidence in order to agree evidence-led recommendations and actions</li> </ol> <p>Business-focused sessions (‘Inward’):</p>

	<ul style="list-style-type: none"> <li>• Early “AGM-style” agenda to formally confirm governance and work programme (i.e. member roles and working groups) and consider previous year’s annual report.</li> <li>• Mid-year “state of the union” meeting to consider the overall performance situation and the previous, current and next year’s budget and business planning.</li> <li>• Late year “final chance” meeting in before the pre-election period to wrap up the municipal year’s business and decide how to monitor issues during the election/nomination season.</li> <li>• Pre-meeting for Members to ask clarifying questions on reports and receive briefings on live issues.</li> <li>• Standing items: minutes/notes of relevant meetings, work programme, member reports, working group reports, review reports and recommendation tracking.</li> </ul> <p>Evidence-focused sessions (‘Outward’):</p> <ul style="list-style-type: none"> <li>• Members, officers, experts, guests, other members invited to be questioned and give evidence.</li> <li>• Focusing on answering themed, strategic, cross-cutting questions e.g. <i>“Is CA activity Leeds-centric?”</i> or <i>“Are residents and members views being taken into account in decision-making?”</i></li> <li>• Pre-meeting for Members to ask clarifying questions, discuss lines of questioning and establish outcomes.</li> <li>• “Wrap up” to establish conclusions, next steps and emerging recommendations.</li> <li>• Reports include cross cutting background information, data and analysis and aim to support Members’ in-session questions.</li> </ul>
<p><b>Profile</b></p>	<p>Parity of profile with executive members, in terms of access to organisational resources and impartial advice by officers.</p> <p>Reporting scrutiny activity to other committees, including through attendance by appropriate Scrutiny Members at appropriate meetings (i.e. Scrutiny Chair / Vice Chairs at the main Combined Authority meetings).</p> <p>Consideration of Scrutiny’s work programme and recommendations in the MCA’s planning, decision-making and activity to ensure Scrutiny participates and contributes to key areas of work.</p> <p>Dedicated communications plan to support and promote Scrutiny activity, including consultation, press releases and social media management.</p>

	Maintain its own network of stakeholders including members, the public, experts, and scrutiny partners to support the scrutiny process.
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## Combined Authority DRAFT Scrutiny Plan 2024-2028

Summary – Scrutiny Plan 2024-2028			
Phase	Focus	Years	Objectives
1	<b>Agreement (Vision)</b>	2023-24	<p>Review and approve improved scrutiny arrangements.</p> <ul style="list-style-type: none"> <li>Review the Scrutiny Protocol, make recommendations and propose a Vision.</li> <li>Convene an IRP to assess allowances according to enhanced duties in new role profiles.</li> </ul>
2	<b>Development (Resources)</b>	2024-25	<p>Build new structures, processes, systems, resources, and member roles:</p> <ul style="list-style-type: none"> <li>Implement new committee and working group structure.</li> <li>Recruit, induct and train members – and assign and trial new ‘member lead’ roles.</li> <li>Identify big / persistent strategic challenges and establish long-term work programme goals.</li> <li>Conduct reviews through working groups.</li> <li>Determine officer support structure (i.e. recruit officers, include scrutiny work in business planning, regular briefing arrangements).</li> <li>Design and test new systems and processes (i.e. key decisions, report templates, etc).</li> <li><i>[Report to government on progress in implementing scrutiny protocol, in the event of any L4 deeper devolution deal.]</i></li> </ul>
3	<b>Application (Activity)</b>	2025-26	<p>Build on structures, processes, systems, additional resources, and member training and experience established in Phase 2 to:</p> <ul style="list-style-type: none"> <li>Deepen level of outcomes-based scrutiny activity.</li> <li>Begin higher-profile evidence sessions and reviews.</li> <li>Expand working group and member activity, according to added resource.</li> </ul>
4	<b>Evaluation (Impact)</b>	2026-27	<p>Independent/external review and evaluation to determine if:</p> <ul style="list-style-type: none"> <li>the Vision is still sound and fit for purpose.</li> <li>the goals of Phases 1-3 have been achieved.</li> <li>there is a demonstrable impact and outcomes in from Scrutiny work.</li> <li>how the CA has benefited from scrutiny as an organisation.</li> </ul>
5	<b>Consolidation (Results)</b>	2027-28	<ul style="list-style-type: none"> <li>Make improvements and adjustments required by the Evaluation.</li> <li>Confirm the Vision has been implemented in full.</li> <li>Outline real impact of Scrutiny since 2024.</li> </ul>

<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Corporate Plan 2024-25</b>
<b>Director:</b>	Sarah Eaton, Director of Strategy, Communications, and Intelligence
<b>Author:</b>	Nia Jackson-Owens, Corporate Planning and Performance Officer

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1. To review and provide feedback on the first high-level draft of the Corporate Plan 2024-25.

## 2. Information

### Corporate Plan 2024-25

- 2.1 Following approval of the 2024/25 budget and business plans at the meeting of Combined Authority on 1 February 2024, work is now underway to develop the authority's public facing Corporate Plan for 2024/25 which will set out the key priorities for the Combined Authority over the forthcoming year.
- 2.2 The Corporate Plan will set out how the Combined Authority will deliver for the region in 2024/25, using information from Directorate Business Plans, whilst also setting out wider ambitions in terms of place shaping and inclusivity.
- 2.3 The Plan will align with, and outline the importance of, the West Yorkshire Plan, explaining how the Combined Authority will contribute to the shared vision and mission for West Yorkshire whilst delivering against the seven agreed corporate objectives set out below:

1. Empowering our communities, towns, and cities to thrive.
  2. Building a sustainable, nature rich and carbon neutral region.
  3. Creating an accessible, clean and customer focussed transport system.
  4. Supporting community safety and accountable, proactive policing.
  5. Championing culture, sport, and creativity.
  6. Driving economic growth and innovation to enable good jobs.
  7. Enabling a diverse, skilled workforce and accessible learning for all.
- 2.4 A summary of the Combined Authority's key achievements against organisational objectives in the 2023/24 financial year will also be provided and this will draw on performance against 2023/24 Key Performance Indicators (KPIs) at year end.
- 2.5 A high level first draft of the Plan is attached at **Appendix 1** for consideration. Over the forthcoming period, further additional work to develop and refine the Plan, particularly in respect of finalising key outcomes and outputs to align with priorities, will be undertaken. Further drafts of the Corporate Plan will be shared with Combined Authority Members for consideration and feedback in advance of the final draft being brought to the next meeting of the Combined Authority for approval in June 2024.
- 3. Tackling the Climate Emergency Implications**
- 3.1 Tackling the Climate Emergency is a key organisational objective. Details on how the organisation will contribute on an annual basis to our long-term commitment to lead by example in having net zero emissions by 2038, and have a positive impact on environment and nature through our work, investment, and funding, will be referenced in the Corporate Plan.
- 4. Inclusive Growth Implications**
- 4.1 Enabling Inclusive Growth is a key corporate objective and therefore measures on how the organisation aims to achieve this, will be set out in our Corporate Plan. One of our key objectives is to deliver our Inclusive Growth Framework in order to reduce inequalities in our communities. Inclusive growth will remain embedded throughout the corporate priorities on which the development of the Corporate KPI's and resulting business planning is based.
- 5. Equality and Diversity Implications**
- 5.1 The equality and diversity aims of the organisation are embedded across the Combined Authority's corporate objectives and the Corporate Plan and Business Plans. Each directorate has corporate targets to meet as part of the business plans. These have been defined through the Equality, Diversity and Inclusion Strategy and Action Plan through which we are aiming towards achieving excellence against the Equality Framework for Local Government.

## **6. Financial Implications**

6.1 There are no financial implications directly arising from this report.

## **7. Legal Implications**

7.1 There are no legal implications directly arising from this report.

7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

## **8. Staffing Implications**

8.1 There are no staffing implications directly arising from this report.

## **9. External Consultees**

9.1 No external consultations have been undertaken.

## **10. Recommendations**

10.1 That the Combined Authority endorses the approach to the development of the Corporate Plan 2024-25.

## **11. Background Documents**

11.1 There are no background documents referenced in this report.

## **12. Appendices**

Appendix 1 [Draft Corporate Plan 2024-25](#)

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**West Yorkshire Combined**  
**Authority Corporate Plan**  
**2024-25**  
**Draft Version**

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## Contents

### Contents for the Plan

- Mayor's Foreword (pending election)
- Chief Executive Foreword
- Our Vision and Our Mission / West Yorkshire Plan / Devolution and Partnership Working / The New Organisational Structure
- The Mayor of West Yorkshire, Combined Authority Board and West Yorkshire Business Board
- Policing and Crime
- Equity, Diversity and Inclusion
- Progress in meeting our objectives
- Our priorities
- Measuring our performance
- Committees
- Our Finances
- List of members
  - The Combined Authority
  - West Yorkshire Business Board (formerly the LEP Board)
  - Senior Leadership Team

Mayor's Foreword (pending election)

To be drafted

Chief Executive Foreword

To be drafted

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## Our Vision and Our Mission / West Yorkshire Plan

2023 saw the launch of the West Yorkshire Plan, setting out our regional priorities and ambitions up to 2040. The West Yorkshire Plan was co-produced and brings together our partners, including the five local authorities, Combined Authority committee members, business groups, universities, and other stakeholders behind a common set of aims.

The West Yorkshire Plan sets out a shared vision and five missions, with the goal of creating a brighter West Yorkshire that works for all. These are:

1. A prosperous West Yorkshire – an inclusive economy with well paid jobs.
2. A happy West Yorkshire – great places and healthy communities.
3. A well-connected West Yorkshire – a strong transport system.
4. A sustainable West Yorkshire – making lives greener.
5. A safe West Yorkshire – a region where everyone can flourish.

We will use our annual State of the Region report to monitor progress against the West Yorkshire Plan targets and wider policies and strategies of the Combined Authority.

The West Yorkshire Plan strengthens our existing policy framework and sits at the top of a suite of policies and strategies aligned to areas of delivery. This year we will continue to embed the West Yorkshire Plan in our ways of working. We will do this by ensuring that our policies and strategies are aligned with the overarching missions and narrative in the Plan, and aligning our corporate planning and reporting processes with the key aims and targets that the West Yorkshire Plan outlines.

## The Mayor of West Yorkshire, Combined Authority Board and West Yorkshire Business Board

The Mayor of West Yorkshire (pending election)

The West Yorkshire Combined Authority

Our work to deliver improved outcomes for the people of West Yorkshire is led by the Combined Authority Board, with the support of the West Yorkshire Business Board and the thematic committees of the Combined Authority. With the Mayor as its chair, the Board brings together the five local authorities of Bradford, Calderdale, Kirklees, Leeds, and Wakefield, working in partnership with the West Yorkshire Business Board and City of York.

The West Yorkshire Business Board

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## Policing and Crime

The Mayor is the voice of the people, setting the strategic direction for policing and criminal justice partners – issuing a new Police and Crime Plan for 2024 - 2028, setting the police budget and holding the Chief Constable to account – making policing answerable to the communities it serves. The Women’s Safety Unit -a 12-month pilot – will see close collaborative work between the Policing and Crime Team, Violence Reduction Partnership and West Yorkshire Police – supporting both the safety of women and girls in West Yorkshire and addressing the national strategic policing requirement focussing on Violence against Women and Girls.

We know that we remain in a period of economic uncertainty, with many different factors affecting the levels of serious violence across the county. We also know that the issues will not simply go away, and we cannot arrest our way out of the problems. The impacts of serious violence have implications for every aspect of our lives, cutting across critical strands of infrastructure, public services, and our communities. The Violence Reduction Partnership is therefore uniquely positioned to seek and orchestrate the solutions, but this cannot be achieved in isolation. Sustainability must be the golden thread that runs throughout our future plans, and it is crucial that we act as one in a co-ordinated and considered manner.

## Equity, Diversity and Inclusion

The focus for 2023/2024 was to continue with the delivery of the Equity, Diversity, and Inclusion (EDI) Plan, to help deliver the Combined Authority's vision to become a leader recognised nationally for our focus and commitment. Alongside the vision, we have a supporting EDI Statement that underpins and directs the importance of embedding EDI in and across all that we do. The West Yorkshire Combined Authority celebrates the difference of all the people we serve, work with and employ. The organisation will hold itself to the highest standards in relation to EDI and we will evidence our commitment in the following ways:

1. The Combined Authority will not tolerate behaviours, actions or words that discriminate on the grounds of race, age, sex, gender, identity, sexual orientation, religion or belief, pregnancy and maternity, marriage and civil partnership or disability.
2. All training for staff on EDI will be mandatory.
3. All staff will be set an annual objective about how they must promote EDI in their work, and we will monitor compliance of line managers with this requirement.
4. We will monitor and report the protected characteristics of our staff to ensure we represent the communities we serve, and we will set targets where analysis shows we have more work to do.
5. We will monitor and report use of our services to ensure fair and equal access in line with the census data and we will set targets where we identify gaps.
6. Compliance with this statement is non-negotiable and any employee found to have breached our policies will be dealt with under the Combined Authority's disciplinary policy.

We are making progress against our Public Sector Equality Objectives (2022-2025) and will continue to address areas for improvement. Particular areas of focus in 2024 are:

1. **Champion EDI externally and develop an excellent regional and national reputation.** We will do this by facilitating EDI across the region, adding value and not duplication, working closely with the Mayor's Inclusivity Champion.
2. **Consult and engage with our people, communities, and businesses to understand their diverse needs and ensure our services meet their needs.** We will do this by understanding the population of West Yorkshire, through the About You Questions, State of the Region data and examining through equality impact assessments.
3. **Ensure our workforce reflects the diversity of West Yorkshire.** We will do this through deeper understanding of the workforce profile and experiences through workforce data audit, Pay Gap reports (gender and ethnicity) and wider employee analysis to identify trends and investigating the reasons for these differences. Crucially, putting suitable plans into action to address any imbalances we find, and appropriately adopting positive action to help us achieve a more reflective workforce profile.

## Draft - Progress in meeting our objectives

### **Empowering Our Communities, Towns and Cities to Thrive**

- A ground-breaking new partnership with Homes England has been signed to build more affordable and sustainable homes for people across the region.
- Working across our partnership we have started and completed more affordable homes in the last two years than in any other two-year period since the financial crisis. Over 800 of those homes are being built, made possible by our Brownfield Housing Fund.

### **Supporting Community Safety and Accountable, Proactive Policing**

- The Mayor's Safer Communities Fund is taking cash seized from criminal activities by police and prosecutors and grants it to projects that are making their neighbourhoods safer, amounting to £2.3 million since 2021.
- To increase the safety of women and girls, and reassure more vulnerable travel users, we recruited a new team of Police Community Support Officers dedicated to West Yorkshire's bus network aiming to reduce crime and anti-social behaviour.
- Secured £1 million funding for a new pilot to tackle anti-social behaviour across the region.
- Our Just Don't campaign, teaching young men and boys the importance of being allies to women and girls, reached millions.

### **Driving Economic Growth, Innovation and Good Jobs**

- Launched the Fair Work Charter in Bradford, with businesses and organisations signing up committing to action on five categories of "Fair Work", to help build a thriving economy that provides better pay, conditions and opportunities for all.
- Announced the West Yorkshire Health, Life Sciences and Digital Investment Zone that will help create over 2,500 high-quality jobs in Kirklees and Leeds.
- Announced a £7.5million fund with Innovate UK, part of UK Research and Innovation (UKRI), for businesses to develop life-changing medical innovations for use in the NHS and across the world.
- Hosted the West Yorkshire Innovation Festival.

### **Enabling a Diverse, Skilled Workforce and Accessible Learning For All**

- Since 2022, we've supported 75,000 people to upskill, re-train, access self-employment or find a job, as making sure everyone in our region has the skills to secure a job is our priority.
- We've supported over 180 schools and colleges to deliver quality careers education.
- Over 5500 people from all demographics have been supported and advised since March 2023 to overcome barriers, access meaningful employment, upskill, reskill and/or improve their labour market status.
- The devolved Adult Education Budget supported more than 47,000 learners in 2022/23, an increase of 10% from the previous year: 8,300 attained their first



ever qualification 5,000 achieved their first Level 2 qualification and 1,100 achieved their first qualification at Level 3.

- West Yorkshire's learner profile in 2022/23 was more diverse compared with the previous year, the proportion of ethnic minority Adult Skills learners increasing to 57% from 54%.

### **Championing Culture, Sport and Creativity**

- We joined forces with creative businesses to launch a new Skills Bootcamp for young people to create opportunities in live events, delivered in Halifax by a Wakefield-based company.
- A £2.3 million 'You can make it here' initiative has been launched to boost West Yorkshire's creative industries.
- We worked with our partners on Leeds Year of Culture 2023 and Kirklees Year of Music 2023.

### **Creating an Accessible, Clean and Customer Focussed Transport System**

- The £2 Mayor's Fares bus fare cap helped thousands of people make ends meet during the cost-of-living crisis.
- Launched a consultation on Bus Reform empowering people from West Yorkshire to have their say on how buses are run.
- Supported nearly 1,500 people to take part in our free adult cycle training.
- Significant progress made on the £26.5 million investment in White Rose Rail Station, due to open in spring 2024, connecting people to jobs, training, education, and leisure activities on the main trans-Pennine route to Manchester via Huddersfield.
- The £20.5m upgrade of Halifax Bus Station was partially re-opened to the public. The state-of-the-art facility allows for greater capacity so more journeys can take place and has won a sustainability award.

### **Building a Sustainable, Nature Rich and Carbon Neutral Region**

- Announced over £54m funding to tackle the climate emergency, by making bus fares affordable, building stronger transport links and supporting training for high-tech green jobs.
- Our Emergency Energy Grants supported 145 of businesses to go green and save on bills, cutting 483 tonnes of greenhouse gases.
- 1,000 green skilled jobs have been pledged.
- Secured £32million funding to cut renters' energy bills, to make over 2,400 socially rented homes cheaper to heat and more sustainable, helping to create a greener West Yorkshire.

### **Inclusivity/EDI**

- Recruited our Inclusivity Champion, and launched our Women of West Yorkshire network, helping to create a West Yorkshire that works for all.
- Our Cost of Living Emergency Fund was distributed to 6,000 of the hardest hit households, helping to meet basic needs and provide mental health support.

- We were shortlisted as contenders for the 2023/24 VERCIDA Inclusive Employer Awards, highlighting the progress we are making as an organisation towards our vision of being a diverse and inclusive employer.

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## Our priorities

Everything the Combined Authority delivers contributes towards achieving our seven corporate objectives, and ultimately the vision and mission of the West Yorkshire Plan. As an organisation we seek to achieve our corporate objectives (outlined in the following sections) whilst also upholding our cross-cutting themes, which support us in ensuring that we are delivering the very best for the region:

- Tackling the Climate Emergency
- Growing an Inclusive Economy
- Embedding Equity, Diversity and Inclusion
- Offering Great Customer Service

This year, our budget and business plans have been developed against a challenging backdrop, with the cost of living crisis and unprecedented challenges in local government finance, creating difficult circumstances for our local authority partners. Our main priority this year is to ensure that we are working effectively with partners to maximise delivery for the people of West Yorkshire.

In the following sections, we have set out clearly what we will deliver in 2024/25 for the region.

## Measuring our performance

The following table summarises the outputs we will deliver during 2024/25

***(Additional work required to develop, refine and finalise draft outcomes and outputs in table below to align with priorities in advance of final draft Corporate Plan being produced)***

Corporate Objective	Output	By when	EDI
Empowering our communities, towns and cities to thrive.	<ul style="list-style-type: none"> <li>• Enable a minimum of 800 new homes (in year) through the Brownfield Housing Fund.</li> <li>• Implement the Strategic Place Partnership including application of the Housing Accelerator Fund (with a minimum of 15 projects supported by March 2025).</li> <li>• Drive progress of Spatial Priority Areas with delivery models for a minimum of 5 SPAs explored by</li> </ul>	March 2025	<p>The Brownfield Housing team will monitor the number of affordable homes developed.</p> <p>The evaluation of the SHDF 2.1 programme will provide details &amp; evidence of EDI outputs achieved. 10% of the measures will improve energy efficiency in social housing occupied by persons of pensionable age, who are generally a more vulnerable group.</p>

	June and a business case to implement in a minimum of 1 location.		
Building a sustainable, nature rich and carbon neutral region.	<ul style="list-style-type: none"> <li>Facilitate the delivery of retrofit improvements to 1300 social housing units.</li> <li>Work in partnership with the West Yorkshire Housing Partnership to develop a 10-year business plan and investment strategy for social housing retrofit with a business case.</li> <li>One Stop Shop for the Better Homes Hub business case in June and launched by March 2025.</li> <li>Develop the new Climate and Environment Plan and Local Area Energy Plans for the whole region.</li> <li>Have a draft Local Nature Recovery Strategy consultation prepared.</li> <li>Solar PV installed on 500 social housing homes.</li> <li>Submit 2 Natural Flood Management business cases for appraisal and 3 projects to commence on site.</li> <li>Submit 1 Capital Flood Infrastructure business case for appraisal and 3 projects to commence on site.</li> <li>175 businesses supported directly to become more sustainable.</li> </ul>	<p>March 2025</p> <p>August 2025</p> <p>Business case June 2024, One Stop Shop launched March 2025.</p> <p>All below by March 2025, with Local Area Energy Plans by September 2025.</p>	<p>An aim to increase the resilience of communities in West Yorkshire, with a focus on ensuring that interventions support excluded and deprived groups and communities. For example, lowering flood risk, especially when impacting on risk to life, property or the transport network, will ensure more vulnerable residents (age, disability, pregnancy) live with reduced risk and maintain access to key services during a flood event.</p> <p>Reduction of fuel poverty through social housing retrofits and solar PV installations, ensuring everyone can live in a warm, comfortable and low carbon home.</p>
Creating an accessible, clean and customer focussed transport system.	<ul style="list-style-type: none"> <li>Approval of the Mass Transit Strategic Outline Case from the Department of Transport expected.</li> </ul>	<p>September 2024</p> <p>July 2025</p>	Improvements made will meet accessibility standards to increase access to the transport network.

	<ul style="list-style-type: none"> <li>• Public consultation on route options and Royal Institute of British Architects stage 3 design for the first phase of Mass Transit to commence.</li> <li>• Accessibility improvements to be made at 1000 bus stops across West Yorkshire.</li> <li>• 164 additional car park spaces to be created at existing rail stations (including 11 blue badge spaces).</li> <li>• 20 upgraded rail stations to encourage a modal shift to using rail.</li> <li>• 2 transport projects (A639 and A629) in high deprivation areas to improve bus journey times and provide active travel routes.</li> <li>• Passive provision for 94 EV charge points at rail station car parks, to encourage a modal shift to using rail.</li> </ul>	<p>All following – March 2025</p>	
<p>Supporting community safety and accountable, proactive policing.</p>	<ul style="list-style-type: none"> <li>• Develop and publish the 2024-28 Police and Crime Plan.</li> <li>• Commission services for victims and witnesses/survivors of all crime and criminal justice outcomes to deliver the Police and Crime Plan priorities, including a West Yorkshire wide restorative justice service by July 2024, victim support services for all victims of crime by April 2025 and independent sexual violence advisers by April 2025.</li> <li>• Publish a nationwide Serious Violence</li> </ul>	<p>March 2025</p> <p>January 2025</p>	<p>Consultation and engagement with communities in West Yorkshire to ensure all are appropriately represented.</p>

	<p>Strategic Needs Assessments, Response Strategy and Locality Profiles</p> <ul style="list-style-type: none"> <li>Contribute to the reduction in Hospital admissions for assaults with a knife or sharp instrument, knife and sharp instrument enabled serious violence and non-domestic homicides through the serious violence duty partnership and high impact interventions including the A+E and Custody navigator programmes and Community Leader programme.</li> </ul>		
Championing culture, sport and creativity.	<ul style="list-style-type: none"> <li>Reach commitment from the British Library and partners to a route to public sector ownership for a site for the British Library North, and agree a programme of first phase intervention works.</li> <li>Engage with at least 105, cultural, heritage, sport and creative industries businesses.</li> <li>750,000 audience engagements with Culture, Heritage or Sport.</li> </ul>	March 2025	<p>Increased diversity in the creative industries sector through audience engagement with events.</p> <p>Grow and diversify the creative industries sector by collaborating with Skills teams to broker opportunities for training to meet sector need.</p>
Driving economic growth and innovation to enable good jobs.	<ul style="list-style-type: none"> <li>Publish the new Economic Strategy and Action Plans.</li> <li>350 businesses will be supported with overseas trade initiatives.</li> <li>3000 businesses supported to innovate and grow.</li> <li>Account management of 120 foreign owned businesses across all</li> </ul>	March 2025	<p>Engagement and consultation with relevant and diverse stakeholders in developing strategies to ensure representation.</p> <p>Specific targets will ensure that businesses traditionally excluded from export activity will be supported with</p>

	West Yorkshire districts		overseas initiatives, such as ethnic minority led and female-led businesses.
Enabling a diverse, skilled workforce and accessible learning for all.	<ul style="list-style-type: none"> <li>• 48,700 adults supported to upskill or retrain and 500 engagements through Skills for Business.</li> <li>• 181 schools to have made progress in delivering quality careers education across the academic year.</li> </ul>	March 2025	<p>Taken from business plan:</p> <p>(For AEB)  43% Learners from ethnic minority groups (WY demographic 20%)  23% Learners with learning difficulties and disabilities (match WY Demographic 43% Unemployed Learners  67% Female learners  For non-AEB:  • Ethnic minority – target to reflect population data  • People with disabilities – target to reflect population data  • Women – 50%</p> <p>Influence employers to become more inclusive (link to fair work charter) including by working with our programmes to encourage underrepresented entrants into key sectors.</p>

## Committees

Each decision-making committee is responsible for overseeing a specific policy area, with membership including Combined Authority members, local authority members, private sector and advisory representatives.

Place, Regeneration and Housing Committee

- Portfolio Lead/ Chair - Councillor Denise Jeffery

Climate, Energy and Environment Committee

- Portfolio Lead/Chair - Cllr Jane Scullion

Transport Committee

- Portfolio Lead/ Chair - Cllr Susan Hinchcliffe

Culture, Heritage and Sport Committee

- Portfolio Lead/ Chair – Mayor Tracy Brabin

Business, Economy and Innovation Committee

- Portfolio Lead/ Chair - Cllr James Lewis

Employment and Skills Committee

- Portfolio Lead/ Chair - Cllr Cathy Scott



## Devolution and Partnership Working

The Combined Authority has a bold and ambitious plan for West Yorkshire. The scale of our ambitions, alongside the challenges we have to overcome, will need further investment and powers. We want to further boost productivity, be a net-zero economy, and ensure everyone in the region can enjoy a good standard of living. This year we plan to work in partnership with national government to deliver further devolution; we believe that with more control and powers we can deliver our ambitious vision for the region.

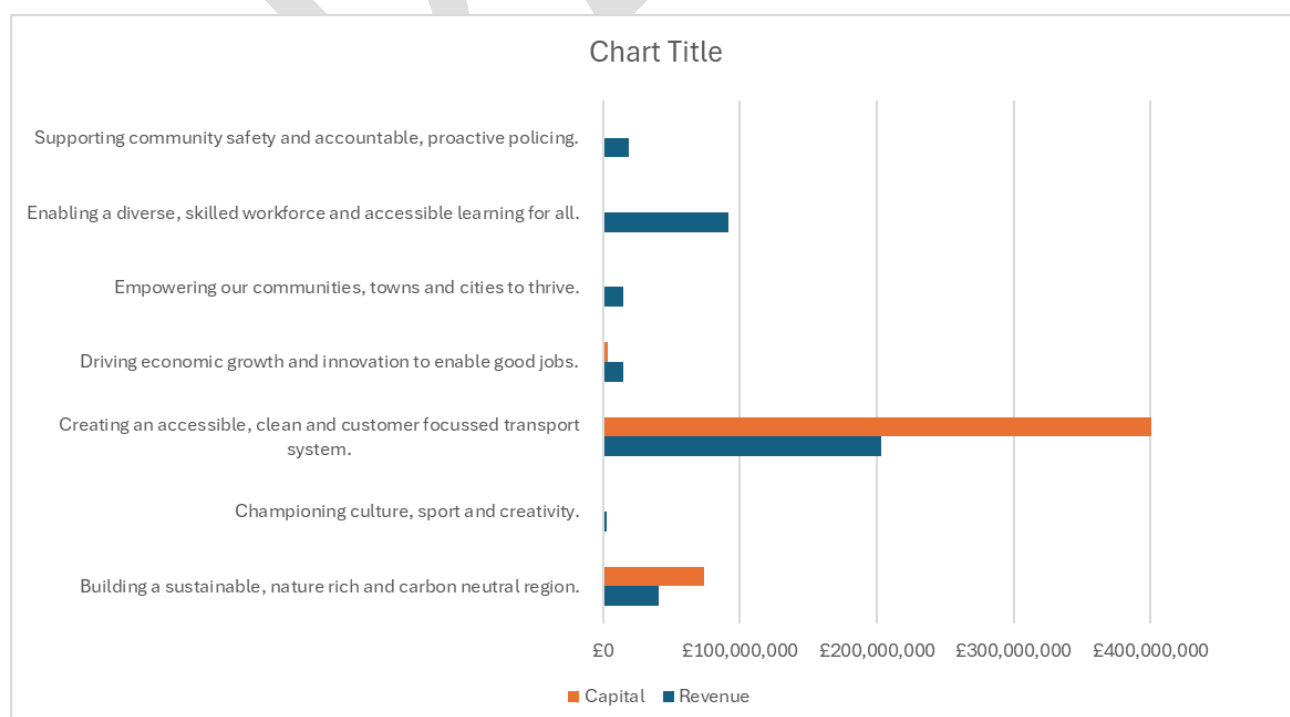
Our vision for West Yorkshire cannot be achieved in isolation. Partnership is at the heart of everything we do. Our partnership of six with our local authorities is fundamental to our approach. The Combined Authority also engages with local residents and businesses and works with other organisations in West Yorkshire to develop, shape and deliver our policies, services and projects. In West Yorkshire we have a proud history of partnerships which we continue to harness, bringing our passion and pride along with local, national, and international partners to build success. The strength of partnership between the public and private sector is something we are particularly proud of. We work collaboratively to help create the right conditions for investment and jobs to flourish, and through our trusted and established partnerships, we will harness our assets to create a brighter West Yorkshire which works for all.

West Yorkshire is a trusted partner that delivers. The Combined Authority and partners are therefore keen to be in the next wave of further devolution to enable our ambitions to be delivered.

## Our Finances

Our income comes from a variety of sources, including successful, multi-million pound bids to central Government for funding, which we secure and spend for the benefit of the people and businesses in West Yorkshire.

Corporate Objective	Revenue	Capital	Total
Building a sustainable, nature rich and carbon neutral region	£40,808,000	£73,880,000	£114,687,000
Championing culture, sport and creativity	£3,075,000	£0	£3,075,000
Creating an accessible, clean and customer focussed transport system	£203,257,000	£400,672,000	£603,929,000
Driving economic growth and innovation to enable good jobs	£14,798,000	£3,765,000	£18,563,000
Empowering our communities, towns and cities to thrive	£14,562,000	£0	£14,562,000
Enabling a diverse, skilled workforce and accessible learning for all	£91,842,000	£0	£91,842,000
Supporting community safety and accountable, proactive policing	£19,161,000	£0	£15,929,000
<b>Total</b>	<b>£387,503,000</b>	<b>£478,316,000</b>	<b>£865,819,000</b>



Please note for Corporate Objective 'Supporting community safety and accountable, proactive policing' the budget for West Yorkshire Police is not included.

## The Combined Authority (To be amended post election)

The Combined Authority is made up of the Mayor of West Yorkshire, as well as the elected leaders of Bradford, Calderdale, Kirklees, Leeds and Wakefield councils, opposition members, plus York and the WY Business Board Chair representing views of business.

*This is membership at time of publishing our Corporate Plan. Membership may be subject to change from June 2024.*

Tracy Brabin (Mayor, CA Chair)

Councillor James Lewis (Leader, Leeds City Council and Deputy Mayor / CA Deputy Chair)

Councillor Susan Hinchcliffe (Leader, Bradford Council)

Councillor Jane Scullion (Leader, Calderdale Council)

Councillor Cathy Scott (Leader, Kirklees Council)

Councillor Denise Jeffery (Leader, Wakefield Council)

Councillor Clair Douglas (Member for York, non-voting)

Councillor Rebecca Poulsen (Bradford, Conservative Balance Member)

Councillor Sue Holdsworth (Kirklees, Liberal Democrat Balance Member)

Councillor Alan Lamb (Leeds, Conservative Balance Member)

Mandy Ridyard (Mayor's Business Advisor, West Yorkshire Business Board)

All decisions taken – including those relating to investment - are approved at public Combined Authority meetings which take place six times a year.

Decisions relating to the Mayor's Police and Crime Commissioner functions are published online and reported to the Police and Crime Panel.

## West Yorkshire Business Board (formerly the LEP Board)

The West Yorkshire Business Board (WYBB), formerly known as the Leeds City Region Enterprise (LEP) Board, is led by a private sector chair and brings together business, council, voluntary and community sectors and university leaders.

*This is membership at time of publishing our Corporate Plan. Membership may be subject to change from June 2024.*

Mandy Ridyard (Chair) – Mayor’s Business Advisor, Produmax

Prof Shirley Congdon – Vice-Chancellor and CEO, University of Bradford

Asma Iqbal – Chadwick Lawrence (Board Diversity Champion)

Jane Atkinson CBE – Enfinium

Fara Butt – Shire Beds

Nicky Chance–Thompson MBE – Piece Hall

Aaron Holt – Holdson

Lisa Johnson – Starship Technologies

Annette Joseph MBE – Diverse & Equal

Sherin Mathew – AI Tech UK

Kamran Rashid –The Socially Conscious Company

Natalie Sykes – James Wilby

Kully Thiarai – Creative Director and CEO, Leeds 2023

Barney Mynott – Advisory Representative (West Yorkshire Business Groups)

Mayor Tracy Brabin – Mayor of West Yorkshire

Councillor Susan Hinchcliffe – Leader, Bradford Council

Councillor Jane Scullion – Leader, Calderdale Council

Councillor Cathy Scott – Leader, Kirklees Council

Councillor James Lewis – Leader, Leeds City Council

Councillor Michael Graham – Wakefield Council

Councillor Claire Douglas – City of York Council

## Senior Leadership Team

The senior leadership team of officers is appointed by the members of the Combined Authority. The role of officers is to serve the Combined Authority and the Mayor in providing advice, implementing its policies and delivering services to the local community.

The senior leadership team of the West Yorkshire Combined Authority is headed by the Chief Executive, with each of the Directors having clearly defined areas of responsibility.

Ben Still – Chief Executive

Alan Reiss – Chief Operating Officer

Simon Warburton – Executive Director of Transport

Angela Taylor – Director of Finance and Commercial Services

Sarah Eaton – Director of Strategy, Communications, and Intelligence

Liz Hunter – Director of Policing, Environment and Place

Felix Kumi-Ampofo – Director of Inclusive Economy, Skills, and Culture

Dave Haskins – (Interim) Co-Director of Transport and Passenger Experience

Mick Bunting – (Interim) Co-Director of Transport and Passenger Experience

Vacant - Director of Transport Policy and Delivery

Luke Albanèse – Director of Mass Transit

Caroline Allen – Monitoring Officer and Deputy Director of Legal, Governance and Compliance

## The New Organisational Structure

We are making significant changes to our organisation to ensure that we are focussed on delivering outcomes for West Yorkshire. This has included changing our organisation's operating model and structure to ensure that the outcomes we are trying to achieve, rather than processes, drive our work. This reflects the significant growth and changes in our organisation which have come about with devolution and the increased powers, responsibilities and funding we have.

These changes mean:

- We have clear and accountable leadership, enabling us to proactively influence government and work with our partners to achieve outcomes for West Yorkshire communities and businesses.
- There is greater coherence between our vision, mission and outcomes – meaning all colleagues within our organisation can directly link their role with the outcomes we are trying to achieve.
- We have a robust and realigned corporate centre, which is fit for the future demands of the organisation.

## Corporate Centre

In 2024-25 we will further develop our corporate centre in order to:

- Lead – to set strategy based on evidence, communicate, report and evaluate
- Enable – to provide essential services that support delivery
- Protect – to manage financial, legal and reputation risk

It is essential that as an organisation with responsibility for managing large sums of public money to improve outcomes for people in West Yorkshire, delivery is underpinned by clear strategic alignment, a skilled workforce, good decision making, and effective financial management.

Key priorities for the coming year include:

- Continuing to drive culture change to focus on the delivery of outcomes for the people of West Yorkshire, whilst ensuring good governance and delivering productivity and efficiency gains.
- Providing legal, financial, technological and commercial support for transport reforms including the bus market (subject to decision) and mass transit.
- Continuing to develop our people through an attractive employment offer, focus on learning and development, and delivery of actions to become a more diverse, equitable and inclusive employer – and the development of a longer-term workforce plan.
- A commercial approach that supports delivery of outcomes, delivers value for money, and provides an increased focus on social value through the supply chain to benefit the region and delivery net zero ambitions.
- Streamline the assurance and appraisal system.
- Developing our Medium-Term Financial Strategy to inform investment decisions, aligning to corporate and regional objectives.
- Deliver technological improvements to the systems for providing bus information to passengers in West Yorkshire.
- Ensure that the CA systems are built to enable the delivery of outcomes whilst protecting the organisation from cyber security threats.

With the organisational changes, we are looking to increase our effectiveness at delivery, via greater alignment with missions, greater empowerment, a stronger focus on outcomes, and deeper partnership working.

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<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Corporate Delegations</b>
<b>Director:</b>	Ben Still, Chief Executive
<b>Author:</b>	Caroline Allen, Deputy Director Legal, Governance & Compliance

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To consider a recommendation that a time limited authority is delegated to the Chief Executive, to allow for the creation or amendment of director level roles and to progress to make appointments to these roles following the outcome of the respective recruitment processes. Such authority to be exercised in consultation with the Mayor and only following engagement with Combined Authority members, to enable the Chief Executive to ensure appropriate senior resource is in place to deliver the Authority's priorities.

## 2. Information

### Background

- 2.1 There are large programmes of work referenced in today's meeting, including within the Transport function of the Combined Authority which currently has one vacancy at director level and two further interim directors in place. There is an anticipation that there will be a requirement to recruit to permanent roles at director level and/or revise the current senior structure to ensure this is best placed to progress the Authority's priorities. This needs to progress at pace, and to commence in advance of the next meeting of the Combined Authority in June.

2.2 The appointment of directors is a function currently reserved to the Combined Authority and therefore to enable any recruitment to proceed, authority is sought for the Chief Executive in consultation with the Mayor, to progress during the period between Combined Authority meetings.

### **3. Tackling the Climate Emergency Implications**

3.1 There are no climate emergency implications directly arising from this report.

### **4. Inclusive Growth Implications**

4.1 There are no inclusive growth implications directly arising from this report.

### **5. Equality and Diversity Implications**

5.1 There is potential for the Combined Authority to be able to improve our EDI workforce profile in any recruitment process. As an organisation we are seeking to continue the progress we have made towards being broadly representative of the people we are serving. This improvement can be seen in our workforce statistics over the last few years, but we have identified areas for improvement – particularly at the more senior grades. These include ensuring that we continue to narrow the gender and ethnicity pay gaps by increasing the number of women and people from ethnic minority backgrounds at the more senior levels of the organisation.

### **6. Financial Implications**

6.1 The funding for the posts will be managed within agreed budgets.

### **7. Legal Implications**

7.1 As referred to in this report and set out at section 2.2 of Part 3 (Responsibilities and Functions) of the Constitution of the Combined Authority, the appointment of directors is reserved to the Combined Authority.

7.2 In accordance with the voting arrangements of the Combined Authority, all Combined Authority members may vote on this item with the exception of the Non-Constituent Council Combined Authority Member.

### **8. Staffing Implications**

8.1 There may be changes to the current senior director structure as a consequence of any recruitment activity which could impact on reporting lines, which would be worked through and considered in accordance with current practice.

### **9. External Consultees**

9.1 No external consultations have been undertaken.

## **10. Recommendations**

- 10.1 That the Combined Authority authorises the Chief Executive, in consultation with the Mayor and following engagement with Combined Authority members, to make changes to the senior officer structure at director level, including creating or revising roles (should this be required), and subsequently to make appointments to those roles following the outcome of the respective recruitment processes. Such delegation to be time limited to enable activity to continue up until the next meeting of the Combined Authority on 20 June 2024.

## **11. Background Documents**

There are no background documents referenced in this report.

## **12. Appendices**

None.

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<b>Report to:</b>	West Yorkshire Combined Authority
<b>Date:</b>	14 March 2024
<b>Subject:</b>	<b>Minutes for Information</b>
<b>Director:</b>	Alan Reiss, Chief Operating Officer
<b>Author:</b>	Myles Larrington, Committee Services Officer

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To provide Members with details of the minutes of committees, or notes of informal meetings of Members, that have been published on the West Yorkshire Combined Authority's website since the last meeting.

## 2. Information

- 2.1 The following minutes and notes have been published on the West Yorkshire Combined Authority's website and can be accessed [here](#):

- Governance and Audit Committee, 16 October 2023.
- Place, Regeneration and Housing Committee, 26 October 2023.
- Culture, Heritage and Sport Committee, 26 January 2024.
- Transport Committee, 29 January 2024.
- Finance, Resources and Corporate Committee, 6 February 2024.

## 3. Tackling the Climate Emergency Implications

- 3.1 There are no climate emergency implications directly arising from this report.

#### **4. Inclusive Growth Implications**

4.1 There are no inclusive growth implications directly arising from this report.

#### **5. Equality and Diversity Implications**

5.1 There are no equality and diversity implications directly arising from this report.

#### **6. Financial Implications**

6.1 There are no financial implications directly arising from this report.

#### **7. Legal Implications**

7.1 There are no legal implications directly arising from this report.

#### **8. Staffing Implications**

8.1 There are no staffing implications directly arising from this report.

#### **9. External Consultees**

9.1 No external consultations have been undertaken.

#### **10. Recommendations**

10.1 That the minutes and notes of the Combined Authority's committees be noted.

#### **11. Background Documents**

There are no background documents referenced in this report.

#### **12. Appendices**

None.