

## **WEST YORKSHIRE COMBINED AUTHORITY**

**MEETING TO BE HELD AT 11.00 AM ON THURSDAY, 27 JULY 2023  
IN COMMITTEE ROOM 1, WELLINGTON HOUSE, 40-50 WELLINGTON  
STREET, LEEDS**

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### **A G E N D A**

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- 1. APOLOGIES FOR ABSENCE**
- 2. DECLARATIONS OF DISCLOSABLE PECUNIARY INTERESTS**
- 3. EXEMPT INFORMATION - POSSIBLE EXCLUSION OF THE PRESS AND PUBLIC**
- 4. MINUTES OF THE MEETING OF THE COMBINED AUTHORITY HELD ON 22 JUNE 2023**  
(Pages 1 - 18)

#### **For Decision**

- 5. WEST YORKSHIRE INVESTMENT STRATEGY REVIEW**  
(Lead Member: The Mayor, Director: Angela Taylor)  
(Pages 19 - 74)
- 6. UK SHARED PROSPERITY FUND (UKSPF)**  
(Lead Member: The Mayor, Director: Alan Reiss)  
(Pages 75 - 86)
- 7. APPOINTMENT OF COMBINED AUTHORITY RETURNING OFFICER**

(Lead Member: The Mayor, Director: Alan Reiss)  
(Pages 87 - 90)

## **8. PROJECT APPROVALS**

(a) **INVESTMENT PRIORITY 3: CREATING GREAT PLACES  
AND ACCELERATED INFRASTRUCTURE**

(Lead Member: Cllr D Jeffery, Director: Liz Hunter)  
(Pages 91 - 114)

(b) **INVESTMENT PRIORITY 5: DELIVERING SUSTAINABLE,  
INCLUSIVE AND AFFORDABLE TRANSPORT**

(Lead Member: Cllr S Hinchcliffe, Director: Melanie Corcoran)  
(Pages 115 - 178)

(c) **INVESTMENT PRIORITY 6: CULTURE AND CREATIVE  
INDUSTRIES, SPORT AND PHYSICAL ACTIVITIES**

(Lead Member: The Mayor, Director: Phil Witcherley)  
(Pages 179 - 200)

## **9. GOVERNANCE ARRANGEMENTS**

(Lead Member: The Mayor, Director: Ben Still)  
(Pages 201 - 204)

### **For Information**

## **10. MINUTES FOR INFORMATION**

(Pages 205 - 206)

**Signed:**



**Chief Executive  
West Yorkshire Combined Authority**



**MINUTES OF THE MEETING OF THE  
WEST YORKSHIRE COMBINED AUTHORITY  
HELD ON THURSDAY, 22 JUNE 2023 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 Shabir Pandor	Kirklees Council
Councillor James Lewis	Leeds City Council
Councillor Denise Jeffery	Wakefield Council
Councillor Claire Douglas	City of York Council
Councillor Rebecca Poulsen	Bradford Council
Councillor Alan Lamb	Leeds City Council
Councillor Sue Holdsworth	Calderdale Council
Mark Roberts	LEP Board Representative

**In attendance:**

Ben Still	West Yorkshire Combined Authority
Alan Reiss	West Yorkshire Combined Authority
Simon Warburton	West Yorkshire Combined Authority
Luke Albanese	West Yorkshire Combined Authority
Melanie Corcoran	West Yorkshire Combined Authority
Liz Hunter	West Yorkshire Combined Authority
Angela Taylor	West Yorkshire Combined Authority
Philip Witcherley	West Yorkshire Combined Authority
Caroline Allen	West Yorkshire Combined Authority
Ian Parr	West Yorkshire Combined Authority

**1. Membership of the West Yorkshire Combined Authority**

The Combined Authority considered a report from the Head of Legal and Governance in respect of the appointment of Combined Authority members and substitute members to the Combined Authority; the granting of voting rights to the member of the Combined Authority appointed by the City of York Council and to the Leeds City Region Local Enterprise Member “the LEP Member”); and the position regarding the future appointment of the LEP Member to the Combined Authority.

The Mayor welcomed Cllr Jane Scullion as the appointed member for Calderdale Council, following her assumption of the role of Leader of

Calderdale Council. The Mayor also welcomed Cllr Claire Douglas, the new Leader of the City of York Council, and Cllr Alan Lamb, political balance member from Leeds City Council.

The Mayor welcomed Fatima Khan Shah, who was appointed as the Inclusivity Champion for the Combined Authority and would support the Combined Authority in tackling issues concerning diversity and inequality.

A round of introductions took place for the benefit of new members and observers.

**Resolved:**

- (a) That:-
- the position of Mayor as Chair of the Combined Authority by virtue of that office,
  - the ongoing appointment of the Deputy Mayor by the Mayor,
  - the appointment of Constituent Combined Authority Members and their Substitutes by the Constituent Councils, and
  - the appointment of the Non-Constituent Council Member and Substitute by York City Council, as set out in Appendix 1 to the submitted report, be noted.
- (b) That the LEP Member of the Combined Authority and the Substitute LEP Member would be appointed to the Combined Authority in due course be noted, and the proposal that to ensure LEP Board private sector representation on the Combined Authority at its next meeting on 27 July, a nominated LEP Member may attend to provide representation be agreed.
- (c) That the Non-Constituent Council Combined Authority Member may exercise one vote at any Combined Authority meeting (including any decision-making committee or sub-committee to which the Non-Constituent Council Combined Authority Member is appointed) only in respect of any decision which gives rise to a direct and significant financial liability for the Non-Constituent Council.
- (d) That the Substitute Non-Constituent Council Combined Authority Member may exercise the voting rights granted to the Non-Constituent Council Combined Authority Member, when acting in the absence of the Non-Constituent Council Member.
- (e) That the LEP Member, once appointed, may vote at any meeting of the Combined Authority (including any committee or sub-committee to which the LEP Member is appointed) on any decision, subject to the following exceptions:
- decision-making in relation to budget and levy setting; and
  - the adoption of any implementation plans appended to the Local Transport Plan which relate specifically to the Combined Authority's area (that is, West Yorkshire).

- (f) That the Substitute LEP Member (once appointed) may exercise the voting rights granted to the LEP Member, when acting in the absence of the LEP Member.

## **2. Apologies for Absence**

There were no apologies for absence.

The Mayor thanked Mark Roberts for his leadership as Interim Chair of the LEP, and for his contributions to the LEP as well as to the Combined Authority. The Mayor noted that the recruitment process for a permanent LEP Chair had already begun and a candidate would be appointed in due course.

## **3. Declarations of Disclosable Pecuniary Interests**

There were no declarations of disclosable pecuniary interests.

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

No items were identified as exempt from the press and public.

## **5. Minutes of the Meeting of the Combined Authority held on 25 May 2023**

**Resolved:** That the minutes of the meeting of the West Yorkshire Combined Authority held on 25 May 2023 be approved and signed by the Chair.

## **6. Mayor's Update**

The Mayor highlighted some of the achievements made by the Combined Authority over the previous year.

The Mayor's Fares Scheme which lowered bus fares for passengers throughout the region, a model which was subsequently utilised by the government for a similar national scheme. TransPennine Express had also been placed under the control of the operator of last resort which should improve the reliability of the service.

The Mayor embarked on a trade mission to India, securing over 1,000 jobs for the region. More than 43,000 adults enrolled onto training through the Adult Education Budget, and 2,000 more learners in low-paid jobs had accessed training course.

A new team was created to coordinate the mass transit programme, and a new partnership was agreed with Homes England which would deliver thousands of new homes over the coming years.

Investments have been made in culture and the creative industries, working on a northern cultural corridor with the Chair of the Royal Society. The WOW Barn achieved success by inspiring women into joining the construction industry.

The Mayor noted the challenges faced by the residents of West Yorkshire due to the issue of rising inflation, which has forced many families to rely on food banks and caused more children to grow up in poverty. The Mayor noted that poorer households were hit the hardest, and that the Cost of Living Fund set up by the Combined Authority had been vital in supporting local authorities to reach approximately 6,500 additional households. The Energy Price Emergency Grant had also supported businesses through the challenges of rising energy prices.

The Mayor noted there was more work to be completed in the upcoming year, and the West Yorkshire Plan had recently been published setting out the five missions to achieve before 2040. The Mayor noted that the decisions made by the Combined Authority over the coming year would help pave the way towards a more prosperous and inclusive region that worked for all.

## **7. Committee Arrangements and Appointments**

The Combined Authority considered a report from the Head of Legal and Governance in respect of committee arrangements and appointments.

The Mayor noted that since publication of the agenda papers, the following outstanding nominations had been confirmed:

- Corporate Scrutiny Committee – Cllrs Jane Dowson and Paul Wray
- Economy Scrutiny Committee – Cllr Gohar Almass
- Transport/Infrastructure Scrutiny Committee – Cllrs Kayleigh Brookes and Izaak Wilson

The Mayor noted that Cllr Jane Dowson was proposed as the Deputy Chair of the Corporate Scrutiny Committee. Officers added that the recruitment of LEP Board members was ongoing, and appointments would be made when recruitment had concluded.

### **Resolved:**

**(a)** That, in relation to appointment of committees –

(i) That the following statutory committees be appointed on the terms of reference set out in the relevant Appendix attached to the submitted report:

- Governance and Audit Committee (Appendix 1)
- Economy Scrutiny Committee (Appendix 2)
- Transport/Infrastructure Scrutiny Committee (Appendix 3)
- Corporate Scrutiny Committee, Terms of Reference (Appendix 4)

(ii) That the following decision-making committees be appointed, on the terms of reference set out in the relevant Appendix attached to the submitted report:

- Business, Economy and Innovation Committee (Appendix 5)
  - Climate, Energy and Environment Committee (Appendix 6)
  - Culture, Heritage, and Sport Committee (Appendix 7)
  - Employment and Skills Committee (Appendix 8)
  - Finance, Resources and Corporate Committee (Appendix 9)
  - Place, Regeneration and Housing Committee (Appendix 10)
  - Transport Committee (Appendix 11)
- (iii) That the Joint Independent Audit Committee be appointed, and that the arrangements for the committee were matters for the Mayor and the Chief Constable for West Yorkshire be noted.
- (b)** That, in relation to the appointment of committee members –
- (i) That the Combined Authority appoints its Members to the Governance and Audit Committee, as set out in Appendix 1 of the submitted report, and Joanna Wardman and Debbie Simpson be appointed as Independent Members of the Governance and Audit Committee for this municipal year.
- (ii) That the Combined Authority appoints its Members to each of the decision-making committees as set out in Appendix 13 to the submitted report.
- (iii) That the Combined Authority appoints members to the overview and scrutiny committees as set out in Appendix 13 to the submitted report.
- (iv) That the Combined Authority co-opts members to committees as set out in Appendix 13 to the submitted report.
- (c)** That, in relation to voting rights for committee members, (in addition to any Combined Authority Member exercising one vote) that the Combined Authority:
- (i) That any Independent Member of the Governance and Audit Committee shall be a voting member of that committee.
- (ii) It be noted that any member of a Constituent Council appointed to an overview and scrutiny committee has one vote and that this may be exercised in their absence by their substitute.
- (iii) That any Co-optee from a Constituent Council on any ordinary decision-making committee shall be a voting member of that committee (and of any sub-committee to which they may be appointed by that committee).
- (iv) That any Co-optee who is Deputy Chair of a committee (and a LEP Board member) shall be a voting member of that committee (and of any sub-committee to which they may be appointed by that committee).

- (d) That the Chairs and Deputy Chairs to committees, as set out in Appendix 13 be appointed.
- (e) That Ian Brown and Carolyn Lord continue as Independent Persons in relation to complaints concerning allegations of a breach of the Combined Authority's Members' Code of Conduct on the existing terms for remuneration, until the Combined Authority's annual meeting in 2024.

## 8. Representation on Outside Bodies

The Combined Authority considered a report from the Head of Legal and Governance regarding Combined Authority representation on outside bodies.

Members noted that a private sector member was required to attend the Transport for the North Board, which was usually a member of the LEP. Private sector members have also represented the Combined Authority on other boards, and their continued representation was important as the Combined Authority and LEP become integrated. The Mayor noted the importance of strong private sector representation.

**Resolved:** That the appointments to the outside bodies for the municipal year 2023/24 as detailed in Appendix 1 of the submitted report, be approved.

## 9. Officer Arrangements

The Combined Authority considered a report from the Head of Legal and Governance in respect of the Combined Authority's Officer Delegation Scheme.

Officers clarified that though the appendix included with the submitted report was the latest version, it did not show the tracked changes as intended. Officers confirmed that the changes were mostly minor points of clarification where there may have been ambiguity and provided a verbal summary of the changes made to the document.

**Resolved:** That the Officer Delegation Scheme in relation to Non-Mayoral Functions, attached as Appendix 1 to the submitted report, be approved.

## 10. Constitutional Arrangements

The Combined Authority considered a report from the Head of Legal and Governance to confirm the Authority's Constitutional arrangements in so far as these were not otherwise approved on the agenda.

**Resolved:**

- (a) That the minor amendments to Constitution documents as set out at Appendix 1 of the submitted report be approved



- (b) That the remaining, unamended Constitution documents, for the next municipal year be approved.

## 11. Corporate Governance Code and Framework

The Combined Authority considered a report from the Corporate Performance Manager to advise the Combined Authority on necessary revisions to the Code of Corporate Governance and an associated timeline for this work.

Officers explained that the Corporate Code of Governance set out the principles of how the Combined Authority should operate as a public body. The updated Code of Governance captured the change from having LEP panels to Combined Authority committees, and the integration of the LEP into the Combined Authority with private sector representatives on decision-making committees. The update also included the expansion of inclusive engagement activity beyond the digital platform to further ensure that diverse communities were engaged with, along with the adoption of the West Yorkshire Plan and the annual State of the Region report. Officers noted there was an ongoing programme of organisational change, and further updates would be provided following the conclusion of that process.

**Resolved:** That the proposed revisions to the Code of Corporate Governance and the proposal to review it further and receive a report in the Autumn be endorsed.

## 12. Members' Allowance Scheme

The Combined Authority considered a report from the Head of Legal and Governance in respect of the Members' Allowances Scheme.

Officers noted there were three proposals for change to the Members Allowance Scheme. Firstly, the integration of the LEP Remuneration and Expenses Scheme into the Members' Allowances Scheme. Secondly, a proposal to align the childcare rate to the UK Living Wage and thirdly, to remunerate the independent members of the statutory audit committee.

The Mayor noted the positive change which would reduce the potential barriers faced by members with childcare and caring responsibilities.

**Resolved:** That the Members' Allowances Scheme attached as Appendix 1 to the submitted report be adopted for the municipal year 2023/2024, as amended to reflect those matters set out at paragraph 2.2 in the submitted report.

## 13. Scrutiny Annual Report 2022/2023

The Combined Authority considered a report from the Scrutiny Support Officer to summarise and highlight the work undertaken by the three Scrutiny Committees during the 2022/23 municipal year.

Officers noted the report included examples of the work undertaken by the scrutiny committees, and the topics that had arisen in the Mayor's Question

Time sessions held by each committee. The Mayor expressed thanks to the scrutiny committee members for their role in ensuring the decisions of the Combined Authority were appropriately challenged.

**Resolved:** That the Combined Authority annual report summarising the work undertaken by the overview and scrutiny committees in 2022/23 be noted.

#### **14. Calendar of Meetings 2023/2024**

The Combined Authority considered a report from the head of Legal and Governance to approve the calendar of meetings proposed for the West Yorkshire Combined Authority for 2023-2024.

The Mayor noted that the proposed dates of the Transport Committee were subject to change to accommodate the diaries of the committee membership.

**Resolved:**

(a) That the calendar of meetings of the Combined Authority and its committees for 2023-24 as detailed in Appendix 1 of the submitted report be approved.

(b) That the dates identified for the Transport Committee may be subject to change be noted.

#### **15. Crisis in the Cost of Living and Doing Business**

The Combined Authority considered a report from the Economic Analysis Manager to provide an update on the latest economic and business intelligence, and to provide an update to members on the delivery of policies aimed to help businesses and individuals with the crisis in the cost of living and doing business.

The Mayor noted that the people and businesses of West Yorkshire continued to struggle with the impacts of inflation, with increasing energy, rent, and mortgages among the rising costs. The Mayor suggested that there are longer term issues facing the region, and increased devolution powers would help West Yorkshire to support people more effectively.

Officers summarised the report which provided outlines and updates of the programmes undertaken to support people and businesses in West Yorkshire. Analysis had shown that West Yorkshire contained a higher proportion of households in significant poverty compared to the national average, with around 1 in 3 in fuel poverty and the rates of food bank usage increasing by roughly 33% between 2021/22 & 2022/23.

Officers noted that two key programmes had provided support to people and businesses. The Mayor's Cost of Living Emergency Fund provided £3 million of support to the Voluntary, Community, and Social Enterprise sector via the local districts. The interim evaluation was published with the meeting papers,

and to date had provided £1 million of support to almost 6,500 households, with further support over the coming year.

The Energy Price Emergency Grant was a £1 million fund for small businesses across all sectors to support energy-saving measures and build resilience against longer-term price rises. Officers noted that as of June 2023, 71 projects had been completed with roughly £250,000 of funding allocated.

The Mayor expressed thanks to leaders and district partners for going above and beyond to support people and businesses impacted by inflation.

Members questioned if there had been any lessons taken from the programmes which would inform the delivery of future projects. Officers responded that it had been highlighted that programmes should not be overly prescriptive about how funding is spent in favour of more meaningful consultation with communities involved, and there were also lessons regarding the information collected about those supported which could feel intrusive. The statistics of larger geographical areas may not show the deprivation faced by some who reside there, and so it is important not to discount any areas which are perceived as more affluent than others. Members noted the statistics regarding fuel poverty and food bank use were concerning, and encouraged districts to work together to provide skills support so households could be empowered to access higher incomes. The Mayor noted the importance of gathering data to inform the Combined Authority to provide more effective support.

The Mayor queried if the allocation for businesses was being widened, officers responded that the scheme was one of the first business-to-consumer schemes which had provided significant lessons for future programmes.

**Resolved:** That the latest economic evidence, as well as the policy interventions that had been rolled out thus far be noted.

## **16. Local Visitor Economy Partnership**

The Combined Authority considered a report from the Policy Officer for Employment and Skills to approve the joint application for West Yorkshire LVEP status; note the update of the Destination Management Plan and governance model; and endorse the development of a funding proposal, to establish the region's LVEP, once accredited, subject the Combined Authority's Assurance Framework.

The Mayor noted that West Yorkshire is already prominent on the cultural map thanks to vibrant cities and heritage-rich towns and has also featured prominently in recent television series which has further bolstered tourism. The region welcomed over 65 million visitors in 2022, and approximately 55,000 people were employed in the tourism sector.

Officers noted that the Combined Authority had previously discussed tourism in March 2023, and since then the Local Visitor Economy Partnership had

been developed in joint working with the West Yorkshire districts, to provide an overarching strategy to promote the region as a destination for visitors. A joint working group comprised of members from the visitor economy sector will convene to further the progress made.

Members welcomed the report, and questioned who will lead the working group if elected members will be consulted. Officers responded that the engagement would be led by officers from each district area and include regional stakeholders, but the overall governance model had not yet been confirmed. Multiple working groups would contribute, including a membership group to be chaired by the Mayor, and the suggestion to include district members would be taken into account.

Members questioned what lessons were taken from the 'Welcome to Yorkshire' campaign. Officers responded there were many elements that contributed to the lack of success of the Welcome to Yorkshire campaign and a national review of projects such as 'Welcome to Yorkshire' had been undertaken. The lack of a similar group presented a challenge since there was no national or regional funding allocated and so it is proposed the Combined Authority would contribute and as a result the project would be measure against the spending principles. Officers added that there was a Yorkshire-level campaign as well as a West-Yorkshire-level campaign, and the partnership reviewed how the proposals were taken forward collaboratively without impacting either campaign. Future updates would be presented to members to review the progress.

**Resolved:**

- (a) That the approach of a West Yorkshire LVEP application to VisitEngland be endorsed.
- (b) That the proposed Governance structure and proposals for considering the gainshare to support the activity of the LVEP (to be brought to a future meeting) be noted.

**17. Partnership Working with West Yorkshire Integrated Care Board**

The Combined Authority considered a report from the Associate Director for Improving Population Health to seek approval to enter into the partnership agreement and to agree reciprocal membership arrangements between the Combined Authority and the NHS West Yorkshire Integrated Care Board.

The Mayor noted that targeting socio-economic disparity was a key focus for West Yorkshire, and partnership working was an important way to meet the needs of the region. The partnership with the West Yorkshire Integrated Care Board sets out how more formally describes the relationship between the organisations and how more strategic collaboration can be achieved.

Officers noted that there were many factors that impact health outside of immediate healthcare professions, and good health was vital to an improved personal, local, and regional economy. The collaboration between the Combined Authority and Integrated Care Board should promote the health of

the population for current and future generations. The partnership agreement codified existing strong relationships, with the proposal that the Mayor become a part of the Integrated Care Board.

The Mayor expressed frustration that the Combined Authority did not have responsibility for health and welcomed the innovative collaboration across West Yorkshire to achieve positive outcomes. Members added the Combined Authority can play a large role in improving health, which will also benefit the regional economy, but that it was important to ensure there was no duplication or extra bureaucracy that may hinder progress.

**Resolved:**

- (a) That the Combined Authority enter into the Partnership Agreement with the West Yorkshire Integrated Care Board as attached at Appendix 1.
- (b) The determinants of health and inclusion work programme be endorsed.
- (c) The appointment of the Mayor and the Chief Executive onto the West Yorkshire Health and Care Partnership Board be agreed.
- (d) The Chair of the Integrated Care Board (or their delegated representative) onto the Place, Regeneration and Housing Committee as an ex-officio advisory representative be appointed.

**18. Assurance Framework post LEP integration update**

The Combined Authority considered a report from the Head of Portfolio Management and Appraisal to approve the proposed revisions to the Assurance Framework required because of the changes to the LEP Constitution and governance arrangements following the approval of the LEP Integration Plan.

Officers noted the update factored the changes to the LEP integration, and the management of the end of European funding. The Assurance Framework was also undergoing peer review compared to other combined authorities, and the recommendations were being worked through before a future decision by the Combined Authority.

**Resolved:**

- (a) The proposed revisions to the West Yorkshire Combined Authority Assurance Framework required because of the changes to the LEP Constitution and governance arrangements following the approval of the LEP Integration Plan be reviewed and approved.
- (b) The update on the West Yorkshire Combined Authority Assurance Framework peer review be noted.

## **19. Project Approvals**

### **Investment Priority 2: Skills and training for people**

Members introduced the 'Digital Skills, Green Skills, and Skills Support for Business' programme for consideration. The programme aimed to support employers to develop the digital and green skills of existing employees and promote training for future talent. The members of the Employment and Skills Committee had contributed to this programme, and acknowledged that digital and green skills required development to create better outcomes for West Yorkshire. The Mayor added the committee had pledged to introduce 1,000 green jobs for young people, and that target had already been met, but more are required to deliver on the climate emergency response.

#### **Resolved:**

With respect to the Digital Skills, Green Skills, and Skills Support for Business, the Combined Authority approved that:

- (i) Projects 1 to 4 (Phase 1) of The Digital Skills, Green Skills, and Skills Support Programme proceed through decision point 2 (strategic outline case) and decision point 4 (full business case) and work commence on 320 activity 5 (delivery) of these projects. Project 5 continues work on its full business case.
- (ii) An indicative approval to the Combined Authority's contribution of up to £7,500,000 be given (Projects 1 to 5). The total programme cost is £7,500,000.
- (iii) Approval be given to the Combined Authority's contribution of up to £6,650,000 for Projects 1 to 4 (Phase 1).
- (iv) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Employment and Skills Committee.

### **Investment Priority 4: Tackling the Climate Emergency and Environmental Sustainability**

Members outlined the three schemes for consideration by the Combined Authority. Members noted that the 'Better Homes Hub scheme' aimed to reduce the carbon impact of the region through means such as retrofitting homes. The project for consideration provided a starting point towards meeting the aims of the Combined Authority, but members noted there was still pace to be gained.

The 'Landscapes for Water – Natural Flood Management' scheme would be conducted in partnership with the National Trust, and members noted the greater impact that could be achieved through partnership with other influential organisations.

Members noted the 'Chellow Dene Wetland' project would provide preventative measures against flooding, and would further reduce the carbon impact of the area by introducing a wildflower meadow.

Officers added that there was a potential for additional development funding regarding the Better Homes Hub, subject to confirmation from the government.

**Resolved:**

With respect to the Natural Flood Management Programme the Combined Authority approved that:

- (i) Programme costs of £1,186,090 be approved in order to support the delivery of the Natural Flood Management - Flood Risk and Drainage Programme. The total programme value is £7,392,862.

With respect to Landscapes for Water – Natural Flood Management the Combined Authority approved that:

- (i) The Landscapes for Water – NFM scheme proceeds through decision points 2 to 4 (business justification) and work commence on activity 5 (delivery).
- (ii) An approval to the Combined Authority's contribution of £1,984,000 be given. The total scheme value is £1,984,000.
- (iii) The Combined Authority enter into a funding agreement with the National Trust for expenditure of up to £1,984,000.
- (iv) Future approvals be made in accordance with the assurance pathway and approval route outlined in the submitted report. This will be subject to the scheme remaining within the tolerances outlined in the submitted report.

With respect to the Chellow Dene Wetland the Combined Authority approved that:

- (i) The Chellow Dene Wetland scheme proceed through decision point 2 to 4 (business justification) and work commences on activity 5 (delivery).
- (ii) Approval to the Combined Authority's contribution of £41,000, to the Chellow Dene Wetland scheme. The total scheme value is £75,530.
- (iii) The Combined Authority enter into a funding agreement with Aire Rivers Trust for expenditure of up to £41,000.
- (iv) Future approvals be made in accordance with the assurance pathway and approval route outlined in the submitted report.

This will be subject to the scheme remaining within the tolerances outlined in the submitted report.

With respect to the Better Homes Hub the Combined Authority approved that:

- (i) The Better Homes Hub programme proceed through decision point 2 (strategic outline case) and work commence on the development of individual scheme business cases as outlined in the submitted report.
- (ii) An indicative approval to the Combined Authority's contribution of up to £18,425,000 be given and the reallocation of indicative funding between programmes and schemes within the Better Homes Hub Programme be delegated to the Director of Policing, Environment & Place. The total scheme value is up to £18,425,000.
- (iii) Development costs of up to £2,585,000 be approved to secure staffing resources, consultancy support, undertake research work, develop individual scheme business cases, and deliver the Local Energy Advice Demonstrator element of the programme, taking the total programme approval to £3,303,293.
- (iv) Future approvals be made in accordance with the assurance pathway and approval route outlined in the submitted report. This will be subject to the scheme remaining within the tolerances outlined in the submitted report.

### **Investment Priority 5: Future Transport**

The Combined Authority considered five schemes for progression. Members noted that several schemes listed within the report had already been approved by the Transport Committee, and the additional schemes would provide further benefit to the people of West Yorkshire. The schemes included the 'Rail Accessibility Package' which would improve the accessibility of 64 rail stations, and the 'Mobility Hubs', 'Leeds City Centre Active Travel Links', and 'Bus Enhancement Package' would provide an array of benefits to commuters and those using public transport for leisure activities.

Officers explained the 'Rail Accessibility Package' was led by Northern, however there was insufficient funding to cover all of the West Yorkshire rail stations and so required some CRSTS funding to supplement the project. All stations would benefit, and 44 stations had been prioritised for larger-scale upgrades. Members welcomed the accessibility upgrades, especially for stations such as Todmorden.

Members raised concerns that rural communities do not have the same level of access to public transport, and suggested more partnership working could help to alleviate some of the issues that frequently affect them. The mayor noted that rural communities are frequently engaged



with, and their views considered. Members added that effective public transport solves many issues, though the national financial position presents challenges regarding the implementation of projects in all locations where they were required.

Members queried if the provisions for e-scooter facilities suggested that e-scooters were permitted on the public highway, and that antisocial behaviour was already prevalent within some areas. The Mayor responded that there were opportunities for pilot schemes as had taken place in other authority areas, and when the scooters are well-regulated they can act as a viable alternative to cars. Officers added the inclusion of e-scooters would act as future-proofing based on the eventual decision made by the government.

Members noted that e-scooters are currently banned from buses and trains and raised concerns that commuters may face difficulty using multiple modes of transport. The Mayor responded there were challenges for cyclists regarding the requirement to pre-book ahead of train journeys. Officers added that e-scooters were only permitted within the trial areas and so some operators have banned them from services since they are technically illegal to use on public roads anywhere else.

**Resolved:**

With respect to the West Yorkshire Rail Accessibility Package the Combined Authority approved that:

- (i) The West Yorkshire Rail Accessibility Package proceed through decision point 2 (strategic outline case) and work commence on activity 4 (full business case)
- (ii) An indicative approval to the Combined Authority costs of up to £5,000,000 be given. The total scheme value is £20,042,450.
- (iii) Development costs of £337,100 be approved in order to progress the scheme to decision point 4 (full business case), taking the total scheme approval to £583,100.
- (iv) The Combined Authority enter into a funding agreement, under Section 56 of the Transport Act, with Northern, for expenditure of up to £583,100.
- (v) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Transport Committee.

With respect to Mobility Hubs the Combined Authority approved that:

- (i) The Mobility Hubs scheme proceeds decision point 2 (strategic outline case) and work commence on activity 4 (full business case).

- (ii) An indicative approval to the Combined Authority's contribution of £3,312,811. The total scheme value is £3,312,811.
- (iii) Development costs of £200,000 be approved in order to progress the scheme to decision point 4 (full business case) taking the total scheme approval to £310,000.
- (iv) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Transport Committee.

With respect to the Leeds City Centre Active Travel Links (North and South) the Combined Authority approved that:

- (i) The Leeds City Centre Active Travel Links (North and South) scheme proceed through decision point 2 (strategic outline case) and work commence on activity 4 (full business case).
- (ii) An indicative approval to the Combined Authority's contribution of £3,304,000. The total scheme value is £3,815,488.
- (iii) Development costs of £400,000 be approved in order to progress the scheme to decision point 4 taking the total scheme approval to £500,000.
- (iv) The Combined Authority enter into an addendum to the existing funding agreement with Leeds City Council for expenditure of up to £500,000.
- (v) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Transport Committee.

With respect to the Levelling Up - Bus Enhancement Package the Combined Authority approved that:

- (i) The Levelling Up - Bus Enhancement Package proceed through decision point 2 (strategic outline case) and work commence on development of a programme business case to government and individual scheme business cases.
- (ii) An indicative approval to the Combined Authority's contribution of £47,628,832 be given. The total programme cost is £47,628,832.
- (iii) Approval of the delivery costs of £1,500,000 for the Thirsk Row bus hotspot scheme be given, and work continue on activity 5 (delivery). This will replace the existing £1,500,000 CRSTS approval.

- (iv) Development costs of up to £3,950,000 be approved in order to progress the programme business case to government and to support the development of individual scheme business cases up to activity 4 (full business case).
- (v) The Combined Authority enter into an addendum to an existing funding agreement with Wakefield Council for the A639 Park Road scheme for expenditure of up to £970,000.
- (vi) The Combined Authority enter into an addendum to an existing funding agreement with Calderdale Council for the A629 North Halifax scheme for expenditure of up to £2,110,000.
- (vii) Future approvals be made in accordance with the assurance pathway and approval route outlined in the submitted report, subject to remaining within the tolerances outlined.

### **Investment Priority 6: Culture and Creative Industries**

Members considered two schemes for progression. The Mayor outlined both schemes which would take place ahead of the Bradford City of Culture 2025 celebrations. The 'Culturedale: Calderdale Year of Culture 2024' scheme would build on the strong screen, location and community assets of the district and include a programme of many events including the screen/ heritage tie in of the Anne Lister Festival. The 'Wakefield Year of Culture 2024' would also build on its assets across the district including the Hepworth and the Yorkshire Sculpture Park. The Mayor highlighted 'The Hatchling', which would amplify West Yorkshire's cultural and creative ambition and generate commissions and employment across the creative and production services sectors.

#### **Resolved:**

With respect to CultureDale: Calderdale's Year of Culture 2024 the Combined Authority approved that:

- (i) The CultureDale: Calderdale's Year of Culture 2024 scheme proceed through decision point 2-4 (business justification) and work commence on activity 5 (delivery).
- (ii) Approval be given to the Combined Authority's contribution of £800,000. The total scheme value is £2,520,000.
- (iii) The Combined Authority enter into a funding agreement with Calderdale Council for expenditure of up to £800,000
- (iv) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Culture, Heritage, and Sport Committee.

With respect to Wakefield Our Year of Culture 2024 the Combined Authority approved that:

- (i) The Wakefield Our Year 2024 scheme proceed through decision point 2 to 4 (business justification) and work commence on activity 5 (delivery).
- (ii) The Combined Authority's contribution of £800,000 be approved. The total scheme value is £4,500,270.
- (ii) The Combined Authority enter into a funding agreement with Wakefield Council for expenditure of up to £800,000.
- (iii) Future approvals be made in accordance with the assurance pathway and approval route and tolerances outlined in the submitted report. Where required, any future committee level approvals be delegated to the Culture, Heritage, and Sport Committee.

## 20. Minutes for Information

**Resolved:** That the minutes and notes of the Combined Authority's committees and panels be noted.



**Report to:** West Yorkshire Combined Authority

**Date:** 27 July 2023

**Subject:** **West Yorkshire Investment Strategy Review**

**Director:** Angela Taylor, Director of Finance and Commercial Services

**Author:** Heather Waddington, Head of Future Funding Strategy

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 For the Combined Authority to endorse the revisions made to the West Yorkshire Investment Strategy through the annual review process, attached at **Appendix 1**.
- 1.2 This paper is concerned only with the Investment Strategy. It is not seeking funding approvals for any individual projects.

## 2. Information

- 2.1 In March 2020 West Yorkshire Leaders and Government signed a 'minded to' devolution deal for West Yorkshire, which set out a raft of new powers and funding, including the requirement for the Combined Authority to create a Single Investment Fund (SIF).
- 2.2 At the Combined Authority in July 2020, the high-level operating principles of the SIF were agreed. It was also agreed that the SIF should be outcome focussed, with local decision making clearly guided by the overarching Strategic Economic Framework.
- 2.3 Further development was then undertaken and at the Combined Authority in March 2021, the Combined Authority approved the approach to the SIF and the outline design of the West Yorkshire Investment Strategy (WYIS).

- 2.4 In June 2021, following the election of the Mayor, the Combined Authority approved the West Yorkshire Investment Strategy. The Investment Strategy sets out the Combined Authority's Investment Priorities. It builds on policies and strategies agreed as part of the newly adopted West Yorkshire Plan. The strategy and investment priorities are set out over an initial investment period covering the period 1 April 2021 to 31 March 2024.
- 2.5 At the time it was agreed that the strategy would focus on economic recovery and resilience, including good jobs and skills, tackling the climate emergency, accelerating infrastructure, improving connectivity and supporting the cultural and creative sector – all with the overarching aim of developing an inclusive economy which benefits everyone, taking in to account the Mayor's pledges. Within the strategy is a commitment to undertake an annual review to ensure the Strategy reflects the current needs and opportunities. This is the second review since the Strategy was approved.

### **The WYIS Investment Priorities**

- 2.6 The WYIS Investment Priorities are framed across six areas. In each, a number of priority project/programme areas are identified that are the focus for intervention over the next three years. Approved at the June 2021 Combined Authority meeting, the Investment Priorities have been developed with a focus on supporting inclusive growth, tackling the climate emergency and reducing inequalities and take account of the Mayor's pledges.
- 2.7 The investment priorities are multi-dimensional and may be applied in combination. There is an expectation that any investment will need to substantially reduce carbon or are able to be offset by carbon mitigation at programme level, in line with the target of achieving a net zero carbon economy by 2038.

### **West Yorkshire Investment Strategy Annual Review**

- 2.8 The WYIS sets out a commitment to undertake an annual review, which aims to take into account changing local and national circumstances, integrate new funding and investment opportunities and determine the best use of resources available to the region to maximise potential.
- 2.9 The economic situation in West Yorkshire has continued to change since the first WYIS was approved in June 2021. The revisions undertaken in 2022 took in to account the impact from the COVID-19 with the overall economic recovery in the UK being strong and growing above pre-pandemic size and updates to evolving strategies and plan since the appointment of the Mayor.

#### Summary of 2023 changes

- 2.10 The 2023 annual review further refreshes the priorities against the current economic climate and ensures alignment to emerging or amended strategies and plans, including the West Yorkshire Plan. Revisions have been made

through a collaborative process between the Combined Authority, and West Yorkshire council partners. Key changes are:

- Amendments to the detail of the Investment Priorities to reflect changes to plans, policies and strategies, and to the prevailing economic conditions;
- Alignment with the Combined Authority's Equity, Diversity and Inclusion Plan, including the requirement for an Equality Impact Assessment to be produced for all proposals at the first stage of the Assurance Framework;
- To enable investments to be made in cases where market failure is not present, but the proposal generates a return on investment to benefit the region.

Further details of the changes are set out below.

#### Investment Priority Review

- 2.11 **Investment Priority 1** has been revised to take into account the current economic situation better reflecting the cost-of-doing business crisis and updating some of the language around Covid restrictions. It also now includes a reference to the policy thinking currently being developed on equity investment.
- 2.12 **Investment Priority 2** has been revised to take into account emerging priorities based on current labour market.
- 2.13 **Investment Priority 3** has been revised to ensure further reference to the Policing strategies and outcomes. Changes relate to the need to commission high quality accessible victims, survivors and witnesses support services in line with the Policing and Crime Commissioning Strategy 2022-2024 and better reference to key strategies. Revisions have also been made respectively to the outcomes, outputs and results as required.
- 2.14 **Investment Priority 4** minimal amendments – overall relate to updating the language post pandemic. Small revisions have also been made respectively to the outcomes, outputs and results as required in line with the West Yorkshire Plan.
- 2.15 **Investment Priority 5** has been revised to ensure it better reflects the connectivity and investment priorities identified in the draft Connectivity Infrastructure Plan published in 2021 and the policies of the West Yorkshire Transport Strategy - recognising the focus on an integrated transport system, sustainable modes of transport, that include public transport but not limited to these modes – such as active travel, shared mobility and electric vehicles. Small revisions have also been made respectively to the outcomes, outputs and results as required in line with the Connectivity Infrastructure Plan and the West Yorkshire Plan.

- 2.16 **Investment Priority 6** has been renamed from ‘Culture, Creative Industries, Sport and Physical Activities’ to ‘*Creative Industries, Culture, Heritage and Sport*’. This is to better reflect the Culture Heritage and Sport Framework. Revisions have also been made respectively to the outcomes, outputs and results as required.
- 2.17 In summary the Investment Priorities are now:

<b>Investment Priority 1:</b>	Good Jobs and Resilient Businesses (including entrepreneurialism)
<b>Investment Priority 2:</b>	Skills and training for people
<b>Investment Priority 3:</b>	Creating Great Places and Accelerated Infrastructure
<b>Investment Priority 4:</b>	Tackling the Climate Emergency, and Environmental Sustainability
<b>Investment Priority 5:</b>	Delivering Sustainable, Integrated, Inclusive and Affordable Transport
<b>Investment Priority 6:</b>	Creative Industries, Culture, Heritage and Sport

Cross Cutting Themes

- 2.18 The cross-cutting theme of *Tackling Inequalities* has been revised in line with the Combined Authority’s Equity, Diversity and Inclusion vision, which now incorporates the emerging priority for addressing and including health outcomes in the region. Overall the section has now been renamed to *Tackling inequalities and determinants of health*.

Assurance Framework

- 2.19 In Appendix 2 to the WYIS, the Assurance Framework diagram has been updated to align with the updated West Yorkshire Assurance Framework 2023.

Prioritisation Framework and Gateway Assessment

- 2.20 The Prioritisation Framework criteria for Activity 1 of the Assurance Framework has been revised along with the Gateway Assessment Matrix, with revisions made to the criteria for:

- The pass fail criteria has been updated to ensure the Combined Authority is able to invest in projects where market failure may not be evident but creates an opportunity for a return on investment in a



different way to the region – this is also reflected in the SIF operating principles (section 4).

- Sequencing – updated against the emerging urgent priorities of addressing the cost of living /doing business crisis and tackling climate emergency:
- Tackling Inequalities and supporting Diversity: all projects are, at Stage 1 of developing a project, required to undertake an Equality Impact Assessment to ensure that projects demonstrate that they proactively address the needs of disadvantaged groups.

2.21 The review of the WYIS has resulted in a document which better reflects the current economic landscape and will ensure that the region continues to take advantage of opportunities presented whilst ensuring that we are delivering on our priorities for West Yorkshire.

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

3.1 Tackling the Climate Emergency is at the heart of the objectives for the WYIS and tackling the climate emergency is a key investment priority. Decision making in respect of climate change has been further strengthened through the development of the carbon impact assessment tool. This will strengthen how clean growth and climate change impacts are considered as part of all schemes that come through the Assurance Framework.

3.2 Tackling the Climate Emergency, including climate change, impact assessment / considerations are all now included in all Capital Spending and Project Approvals reports. This ensures that the business cases now reflect the Climate Emergency priority and evidence that they will reduce carbon emission (both directly and indirectly).

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

4.1 Inclusive growth is core within the Investment Priorities to ensure everyone benefits from the investments made across the region. In addition the Inclusive Growth Framework forms a core part of the Strategic Economic Framework which guides the priorities of the WYIS.

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

5.1 Reducing inequality is a cross cutting theme within the Investment Priorities of the WYIS to ensure that investments made across the region support equality and diversity. The annual review captures the change to make Equality Impact Assessments mandatory for all schemes at stage 1 of the assurance framework as part of scheme development to ensure that at schemes progress through the WYIS and Assurance Framework equality, diversity and inclusion is given due regard.

## **6. Financial Implications**

- 6.1 The Investment Strategy sets out the Combined Authority's prioritisation approach to capital and revenue projects/programmes, led by strategic outcomes rather than by specific funding streams. Financial reporting and monitoring will be re-shaped around this opportunity.
- 6.2 The WYIS sets out the requirement for all project sponsors to have a funding agreement with the Combined Authority.

## **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 Combined Authority approves the revisions to the West Yorkshire Investment Strategy.

## **11. Background Documents**

- The previous June 2022 paper can be found [here](#).
- The previously agreed West Yorkshire Investment Strategy can be found [here](#).
- The West Yorkshire Devolution Deal March 2020 can be found [here](#)

## **12. Appendices**

Appendix 1 – Revised West Yorkshire Investment Strategy.

# WEST YORKSHIRE INVESTMENT STRATEGY

~~BUILDING A BETTER WEST YORKSHIRE~~

**A BRIGHTER WEST YORKSHIRE THAT WORKS FOR  
ALL**

**1 April 2021 – 31 March 2024**

***Annual Review July 2023***

# Contents

<b>SECTIONS</b>	<b>Page No.</b>
1 Introduction	3
2 <b>West Yorkshire Plan</b>	5
3 The Single Investment Fund	6
4. West Yorkshire Investment Strategy	8
5. Investment Priorities	11
6. Identifying projects and programmes	22
7. Prioritising and assessing investments	23
8. Monitoring and Evaluation	26
9. <b>Appendices</b>	
• Appendix 1 – SIF Resources	27
• Appendix 2 – West Yorkshire Assurance Framework	28
• Appendix 3 – Prioritisation Framework	29
• Appendix 4 – Gateway Assessment Matrix	31

# 1 Introduction

## 1.1 About the West Yorkshire Investment Strategy

This is the Investment Strategy for the West Yorkshire Combined Authority (Combined Authority). The West Yorkshire Investment Strategy (WYIS) sets out the arrangements by which the Combined Authority will direct and make decisions about funding contained within the Single Investment Fund over a defined investment period. It explains the Combined Authority’s key investment priorities and the criteria against which any schemes will be evaluated to ensure strategic fit. The priorities within the WYIS have been informed by the **West Yorkshire Plan**.

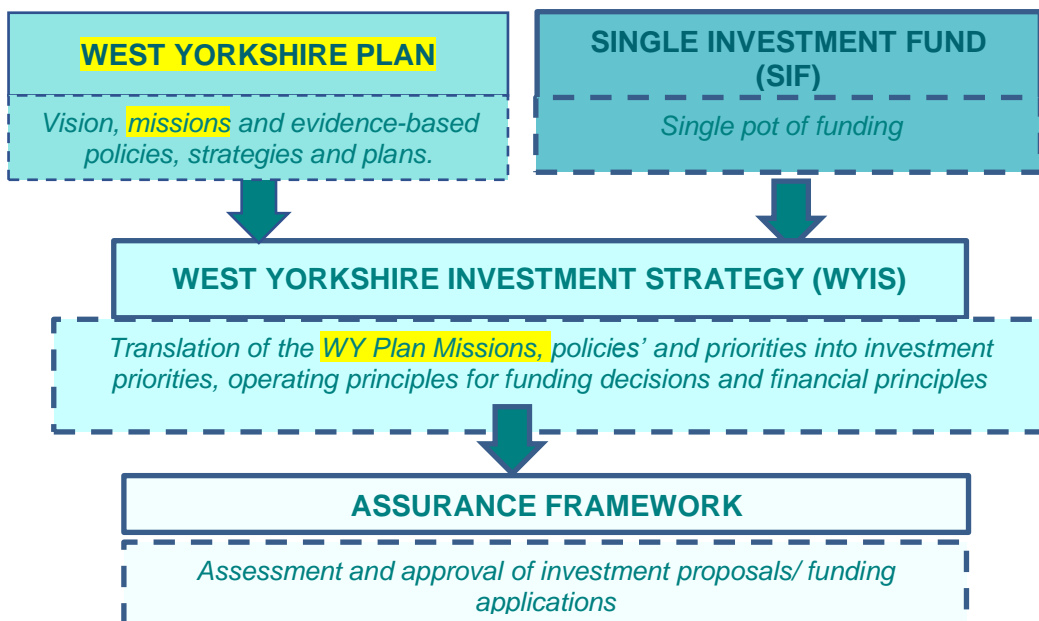
The WYIS also sets out the approach to delivery, identifying the role of the Combined Authority in maximising the benefits of future investment and how investment decisions are made through its, Government approved, Assurance Framework. **A Financial Strategy is being finalised**, which will set out how schemes will be funded, spending plans and financial rules.

The investment period for the current West Yorkshire Investment Strategy (WYIS) is April 2021 to March 2024.

The Combined Authority works in collaboration and partnership with the five local authorities in West Yorkshire to agree the investment priorities which in turn will deliver the outcomes set out in this document to benefit and grow the region.

As an Accountable Body for large sums of public money the Combined Authority is required to ensure that it invests its funding well and will enter into funding agreements with any party that it provides funding to, including the local authorities.

The diagram below shows the high-level process, which is explained further in the sections of this document which follow.



## 1.2 Updating the West Yorkshire Investment Strategy

The Investment Strategy will be reviewed annually to take account of changing local and national circumstances, integrate new funding and investment opportunities and determine the best use of our resources to maximise potential.

## 1.3 Our place - West Yorkshire

The West Yorkshire Combined Authority was established in 2014 to bring together local councils and businesses to champion the region's interests nationally and internationally, securing investment from Government and other sources to drive the economy forward, by carrying out economic regeneration and development functions as well as acting as the local transport authority for West Yorkshire.

In March 2020, the West Yorkshire councils and the Combined Authority agreed a "minded to" devolution deal with Government. The deal detailed £1.8bn of Government investment (including £1.14bn over 30 years), to be subject to local influence and decision-making, enabling spend on local priorities, together with a range of new devolved functions.

The election of the first West Yorkshire Mayor, Tracy Brabin followed in May 2021.

The work of the West Yorkshire Combined Authority covers the West Yorkshire authority areas of **Bradford, Calderdale, Kirklees, Leeds and Wakefield.**



West Yorkshire is key to re-balancing the national economy and enabling the North of England to 'level up' and contribute fully to, and benefit from, national economic growth. Located at the heart of the Northern Powerhouse, with an economy larger than that of several European countries, all our cities and towns have distinctive strengths built from their communities, heritage, character, industries and cultural assets. The unique mix of places, people and businesses within the region, are vital to our long-term success.

It should be noted that some of the programmes and schemes managed by the

Combined Authority cover a broader geography than West Yorkshire. Collaboration with wider partners continues to be important, however the main focus of this investment strategy is supporting outcomes and investment within West Yorkshire.

## 2 West Yorkshire Plan

In May 2023, the Combined Authority agreed to formally adopt the West Yorkshire Plan as the overarching strategic framework for the region.

The West Yorkshire Plan sets out a shared vision, narrative, and ambitions for the region. The purpose of the West Yorkshire Plan is to:

- Explain who West Yorkshire is and what we want to achieve
- Set the trajectory for the longer-term up to 2040
- Ensure that government and wider local and national stakeholders are clear on the priorities and ambitions of the region
- Ensure that all regional partners speak with one strong voice

The WY Plan includes five missions, that are aspirational and represent long term ambitions for West Yorkshire. State of the Region reporting will continue to provide the monitoring framework underpinning the West Yorkshire Plan targets and wider policies and strategies of the Combined Authority.

The WY Plan strengthens our existing policy framework which includes a suite of policies and strategies aligned to areas of delivery.

Our vision for West Yorkshire is

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

Five missions have been set to achieve this:

**Mission One:** A **prosperous** West Yorkshire – an inclusive economy with well paid jobs

**Mission Two:** A **happy** West Yorkshire – great places and healthy communities

**Mission Three:** A **well-connected** West Yorkshire - a strong transport system

**Mission Four:** A **sustainable** West Yorkshire – making lives greener

**Mission Five:** A **safe** West Yorkshire – a region where everyone can flourish.

All our policies and strategies work toward meeting at least one of these missions.

For full details of the policies, strategies and missions within the West Yorkshire Plan, please click [here](#).

The Combined Authority publishes an annual State of the Region report, which reviews of the performance of West Yorkshire against key socio-economic and environmental indicators, the reports are available [here](#).

The report provides a stock take of where West Yorkshire currently stands, using a



basket of headline indicators developed as part of the **West Yorkshire Plan**. It highlights areas of strength and positive trends in the local economy but also flags key issues and challenges that are priorities for future action.

The report aims to provide a balanced and objective view of economic performance in the region and gives some insight into the difference being made through the combined action of all partners in West Yorkshire.

### 3 The Single Investment Fund (SIF)

The West Yorkshire Devolution Deal requires the Combined Authority to create a fully devolved funding programme covering all budgets for devolved functions.

The Single Investment Fund (SIF) has been designed to ensure it supports delivery of the Combined Authority's strategic objectives and provides an opportunity to create a 'single pot' which brings together the Combined Authority's funding, including legacy and new funding streams secured as part of the devolution agreement. The aim is to give greater local freedom and flexibility over how to prioritise investments to fully realise the region's ambitions.

The 'Single Pot' approach to funding is a significant fiscal agreement in devolution deals which consolidates funding lines and reduces ring-fences. This pot will comprise a flexible, multi-year settlement providing the West Yorkshire Combined Authority with the freedom to deliver its growth priorities, including the ability to re-direct funding to reflect changing priorities, whilst upholding its statutory duties.

The SIF will consequently be the key funding tool for West Yorkshire. It will support the long-term delivery of the strategic priorities in the **West Yorkshire Plan**.

The Single Investment Fund will provide resources to the region to help reduce spatial and social inequalities which exist within the region. This will be crucial to enabling the region to thrive and be successful.

West Yorkshire Combined Authority, and its partner councils will work together to develop an investment strategy which will help realise the potential of every place and every person, building on their unique strengths, spreading opportunities for individuals and businesses, and celebrating every city and town within the region.

Through investing in our physical assets (infrastructure and housing), human capital (skills and health), intangible capital (ideas and innovations), financial capital (business finance), social capital community and trust), and institutional capital (through strong local leadership) place inequalities and the economic gap between areas will reduce and eventually close. The Combined Authority, in collaboration with the five councils, will strive to prioritise investments that contribute towards this reduction.

#### 3.1 Resources of the SIF

The SIF brings together Combined Authority funding streams including legacy and new funding streams secured as part of the devolution agreement. It includes a flexible, multi-year settlement providing the Combined Authority with the freedom to deliver its priorities for transformational change, including the ability to re-direct funding to reflect changing priorities, whilst upholding its statutory duties.

The design of the SIF recognises the different levels of funding flexibility which will need to be taken into consideration in terms of their usage, for example some funding streams are ring-fenced for a set purpose but have flexibility in deployment. The funding included in the SIF is included in Appendix 1 **shows the current key funding**

streams but will be updated as new funding is secured. Future external capital and revenue funding is expected to be added over time.

### 3.2 Funding Principles

Unless a strategic purpose or funder conditions over-ride, the funding within the SIF:

- shall not be fully committed in the early years and will be guided by the WYIS. However, consideration to medium term investment will be undertaken to manage inflationary impact.
- will provide development funding, subject to Combined Authority approval, for programme or project pipeline development to Decision Point 2 of the Assurance Framework.
- must be used for investment that provide benefits / outputs solely within the West Yorkshire boundary, unless other external / sub regional funding is received.
- where it generates a return on investment, all financial returns from the investment (e.g., loan capital, interest earned, other capital receipts, equity etc.) must be returned to the SIF for future investment. Though some of these returns may need to be ring-fenced for strategic purposes if defined as such in the original funder conditions.
- where possible, should be aligned or replaced by other funding streams to aggregate spending power and release money back into the SIF for further investment.
- shall generally be used where there are no other means of funding the identified priorities.

### 3.3 SIF limitations

No funds designated through this Investment Strategy can be used to support the Combined Authority or local authorities' existing statutory services.

~~In order to coordinate the extent to which possible SIF and non-SIF sources are used to maximise their beneficial impact in the region, the Investment Strategy shall also be relevant to funding sources that relate to but are not formally part of the SIF, for example European Structural and Investment Funds (ESIF) and its successor programme, the UK Shared Prosperity Fund – which will have a separate investment strategy and approval process.~~

Funds received by the Combined Authority for onward investment into projects are rarely unrestricted. Each source carries its own requirements and restrictions, typically covering their availability, match funding and economic objectives. Furthermore, funding is usually split between “capital” and “revenue”, with a clear indication of their purpose. This will be carefully managed whilst taking a holistic view of the resources available to the area to help support its economic ambitions.

### 3.3 Securing additional resources

The SIF only includes funds that are under the control of the Combined Authority. In addition, a wide range of public sector funding opportunities are and will be available over the investment period.

The scale of our ambition for growth and the challenges that need to be addressed to realise our vision will consequently require additional funding. Funding will, in some cases, have the potential to enable development works to progress and to provide a local contribution alongside national funding.

Our plan is to continue to work with Government over the coming years to identify shared priorities and interventions that can enhance the use of our local resources to achieve transformational change in West Yorkshire.

The Combined Authority will seek to influence the allocation of national funding and will submit proposals, where appropriate, to unlock further funds. Local partners will also be encouraged to ensure other available resources are maximised, used as leverage alongside the Combined Authority resources.

## 4 West Yorkshire Investment Strategy

The purpose of the West Yorkshire Investment Strategy (WYIS) is to direct investment and development activity in the short to medium term. The investment period is April 2021 to March 2024. It is designed to provide a sound basis for taking investment decisions and ensure that investments are most effectively targeted at interventions and opportunities that deliver the transformational change required and address the wider strategic aims of the Combined Authority. It is important to do so in a way that maximises value for money and provides different kinds of return to the SIF.

One of the Combined Authority's long-term objectives is to tackle market failures present in the local economy, and to do so in ways that drive inclusive growth, tackle the region's Climate Emergency and create greater opportunities for our communities and people. Intervention in these 'failures', to robustly understand the needs to communities and meet gaps in current provision, is predicated on the presence of a strategic plan to achieve market sustainability in an inclusive way and on the specific intervention's contribution to the WYIS investment priorities. ~~Only those funding proposals which have robust evidence of need and address market failure will be supported.~~ Proposals are subject to the Assurance Framework.

### 4.1 Operating principles

Section 5 sets out the transformational investments that the Combined Authority will commit resources to, the process required to make those investment decisions over the investment period and the criteria that will be used to select and prioritise schemes. This section sets out the operating principles that underpin the priorities and direct the SIF funding.

It is not expected that an undue burden will be imposed on scheme promoters but that the process will provide a means to improve and provide robust decision-making based on a clear set of evidence-based investment priorities.

The Combined Authority will strive to be agile, creative and "mode agnostic", to fund the most effective delivery of our objectives without favouring any one type of intervention.

These principles are not based on the principle of an equal share across priorities or geographies. Places and priorities are expected to benefit in different ways and at different times over the investment period. Investments with the highest potential contribution to the Combined Authority's targeted objectives and outcomes will be supported.

In addition, selection of schemes will be driven by those which support inclusive growth, our climate emergency ambitions, drive social value, tackle market failure, maximise value for money and provide different kinds of return to the SIF.

The SIF funding is guided by the funder of last resort principle, therefore a clear strategic case for public investment must be demonstrated.

As identified above the SIF comprises funding from multiple sources. This section does not seek to describe each source in detail or the potential operating parameters

of each funding stream, but rather to identify the principles which the Combined Authority will observe to guide the finances of the SIF and ensure that the financial model supports the delivery of the wider objectives of the strategy, independently of the funding source.

#### **4.1.1 Risk and Portfolio Management**

Risk will be managed in line with HM Treasury 'Orange Book' Guidance on the Principles and Concepts of Risk.

The Combined Authority recognises that effective risk management is an integral part of good corporate governance and as such should be a part of everyday management processes. The Combined Authority is committed to ensuring the robust management of risk, and as such a corporate risk management strategy is in place to set out a consistent approach to all risk management activities undertaken throughout the organisation. This includes the Combined Authority's risk appetite statement, which is based on risk category. The Risk Management Strategy can be found [here](#).

#### **4.1.2 Funding products**

In order to maximise the resources available to the Combined Authority and its partners, a range of funding products will be considered including, but not exclusively, grant funding, first loss instruments, guarantees, debt (whether senior, junior, corporate or other), quasi-equity, equity and other risk sharing instruments in any combination it considers optimal.

Where the Combined Authority provides non-repayable and sub-commercial funding it will be provided at the lowest level needed to catalyse a scheme. It shall provide commercially priced funds in an amount that reflects the availability of funding, risk and return objectives, and portfolio performance.

Commercial funding where provided will seek to maximise economic and social benefit for the region with any surplus reinvested for public good.

Investment considerations will also be explored where there is a clear case to show that public investment is justified in order to address market failure but also where there is an opportunity to explore areas, where a market failure may not be evident, but where a return on investment can be generated and/or where innovative investments lead to an opportunity which in turn will benefit the region.

Funding will be used, where appropriate, by the Combined Authority to influence the scale of a scheme, timing and operation as required, seeking to optimise its outputs. It will seek to provide gap funding when deploying its funds on a principle of 'funder of last resort' and/ or where the gap funding may unlock schemes to the wider benefit of the region.

#### **4.1.3 Ability to lever in additional funds**

Given the range of investment priorities as described in the six investment priority areas in section 5, available funding could be spent many times over. The ability of partners to therefore submit funding proposals which can lever in additional funds or

can be matched against other sources of funding is encouraged, accepting that not all interventions or places will have access to match funding but may be equally (or more) strategically important and warrant investment.

#### **4.1.4 Underwriting**

Investment proposals will be appraised in line with the Assurance Framework, and the Government's Treasury Green Book and benefit cost analysis approach.

The Combined Authority shall adopt a risk-based approach in which it undertakes a comprehensive but proportionate appraisal of both the scheme and the financial request of the SIF, as described in the Assurance Framework. Any offer of underwriting will reflect the risk and return (always in compliance with **Subsidy Control** legislation), taking into account the Combined Authority's financial position and availability of resources, the outputs available through the proposed scheme and the risks to their realisation, plus externalities.

Where appropriate, the Combined Authority shall structure its funding to allocate and mitigate risks to scheme sponsors, funders, users and stakeholders and shall use its own funding to accept a portion of these risks. In structuring its financial commitments, it will have regard to additionality, value for money, scale of impact, outputs and the financial sustainability of the resources.

#### **4.1.5 Borrowing**

The Combined Authority will use its funding, including prudential borrowing, where appropriate. The Combined Authority has powers to borrow money for transport purposes and, following a change in legislation in early 2022, also has powers to borrow money for non-transport functions.

All borrowing must be undertaken in line with legislative requirements including Local Government Act 2003, CIPFA Code of Practice and Prudential Code, DLUHC guidance and affordability.

The Combined Authority is required to set a treasury management strategy that sets out how the organisation's borrowing, investments and cash flows and its banking, and money market and capital market transactions are managed.

#### **4.1.6 Co-investment**

Co-investing may be considered by the Combined Authority where investable propositions will significantly contribute to the priorities of the region. In all circumstances the Combined Authority will adhere to its own underwriting and approval standards and protocols.

The Combined Authority may participate in financing opportunities led by related and third parties. Third parties may include private investors, enterprises and developers, and voluntary sector organisations.

#### **4.1.7 Generating a Financial Return**

As the SIF will be a key funding tool within West Yorkshire, supporting the delivery of the Combined Authority's strategic priorities, over time there will be an aim to generate a financial return. This is not expected to be on all schemes, only as appropriate and considered. The portion of non-recyclable funding will be driven down over time as SIF takes receipt of other funding and as set out in 4.1.2 above..

#### 4.1.8 Over - programming

Based on past experience, there is a likelihood that schemes slip in delivery. The Combined Authority will prudently over-programme its commitments by up to 10%, where appropriate, in order to maximise the use of funds and the outputs to be achieved.

## 5 Investment Priorities

The Combined Authority has identified transformational Investment Priorities which it will commit resources to, subject to the detailed consideration, appraisal and approval of business cases. The Investment Priorities will support the delivery of the West Yorkshire Mayor's pledges, tackle the challenges we face and drive growth in line with the vision outlined in the West Yorkshire Plan.

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Given the scale of economic challenge arising out of the aftermath of the pandemic and the subsequent cost of living and cost of doing business crises an element of sequencing and prioritisation has been undertaken to ensure that our investment priorities support projects and/or programmes which will unlock transformational change, specifically schemes that will enable individuals and businesses to respond to challenges presented by the current cost of living and doing business crises.

These crises present substantial challenges to West Yorkshire, compounding the after-effects of the pandemic. High energy costs and rapidly rising food prices, together with increasing interest rates are squeezing household budgets, with the greatest impact being felt by disadvantaged households. This is reflected in rates of fuel poverty and food poverty that are much higher in West Yorkshire than nationally.

The impact of high inflation and interest rates on households' disposable income has direct implications for business, weighing down on consumption-reliant sectors such as recreation, accommodation and food and drink venues. Liquidations in these sectors have increased relative to the overall West Yorkshire business base. West Yorkshire also has a large number of energy intensive businesses, partly reflecting its strong reliance on the manufacturing sector, many of which are not eligible for support under the government's two-tier arrangements.

In the wake of the pandemic West Yorkshire has seen a reduction in labour market



participation among older people, largely due to increases in long-term sickness. In combination with a labour market that remains tight due to high levels of vacancies and low unemployment business faces recruitment challenges that further add to their costs.

The Investment Priorities are not intended to be an exhaustive list of activity, as new opportunities will arise over the investment period of the strategy. It does, however, identify the key activity which is needed to drive economic recovery across West Yorkshire and is therefore deserving of investment.

## 5.1 Introduction to the Investment Priorities

The core objective is to invest in schemes with the highest potential contribution to the Combined Authority's objectives, the West Yorkshire Mayor's pledges and to maximise the overall delivery in West Yorkshire for many years to come.

The range of socio-economic challenges facing West Yorkshire mean that a comprehensive set of investment priorities is required. This is reflected in the scope of the objectives outlined for the region. The SIF provides the opportunity to bring many of these priorities together to ensure a joined-up action is delivered.

The investment priorities are framed across six investment areas and in each a number of priority project /programme areas are identified that are the focus for intervention over the next three years. The priorities are multi-dimensional and may be applied in combination. Investments will be used to develop a cohesive, vibrant and successful region that works for residents, businesses and visitors alike. Further details are provided at 5.3 below.

<b>Investment Priority 1:</b>	Good Jobs and Resilient Businesses (including entrepreneurialism)
<b>Investment Priority 2:</b>	Skills and training for people
<b>Investment Priority 3:</b>	Creating Great Places and Accelerated Infrastructure
<b>Investment Priority 4:</b>	Tackling the Climate Emergency, and Environmental Sustainability
<b>Investment Priority 5:</b>	<del>Delivering Sustainable, Inclusive and Affordable Transport</del> Delivering Sustainable, Integrated, Inclusive and Affordable Transport
<b>Investment Priority 6:</b>	<del>Culture, Creative Industries, Sport and Physical Activity</del> Creative Industries, Culture, Heritage and Sport

## 5.2 Cross Cutting Themes

The investment priorities are underpinned by our ambitions to reduce inequalities and promote inclusion, and to tackle the Climate Emergency and be net-zero carbon by 2038. These are cross cutting principles, which are embedded in the detail of the priorities provided below. Schemes are expected to take these into account as they form part of the assessments criteria and are included in relevant paperwork.

## 5.2.1 Tackling the Climate Emergency

The Mayor and Combined Authority have declared a climate emergency, recognising that increasing emissions, a depleted natural environment and more extreme weather events, to name but a few, are all having a detrimental impact on the businesses and residents of West Yorkshire.

We need to ensure schemes do not contribute to the problem but are part of the solution. We have placed addressing the climate emergency, whether that is through reducing CO<sub>2</sub> emissions, ensuring preparedness for the effects of a changing climate or ensuring resource efficiency, at the core of this Investment Strategy. As such, every scheme coming forward for investment will be required to demonstrate how it will address the climate emergency, with a particular, but not exclusive, focus on demonstrating how schemes contribute to or complement the West Yorkshire target to be net-zero carbon by 2038.

## 5.2.2 Inclusive Growth

All our investments need to respond to and benefit the people of West Yorkshire and have the impacts on people and communities, at their heart. Consequently, Inclusive Growth is at the heart of the investment strategy given its importance to the economy.

Our proposed measures of success will be critical in demonstrating what impact our investments have had. And the fulfilment of these goals is central to the achievement of our related Inclusive Growth ambitions, such that;

- All individuals and communities in West Yorkshire are enabled to contribute to - and benefit from - our economic prosperity because: they are inspired, confident and engaged;
- All West Yorkshire employers provide fair work because: they value diversity (at all levels), promote employee wellbeing, and invest in their workforce; and
- West Yorkshire is a region which delivers an inclusive economic recovery because: every person - and every community - matters equally, economic and social disparities are not just reduced but eliminated, and diversity - including of our people and communities - is a key strength of the region.

## 5.2.3 Tackling inequalities and determinants of health

The West Yorkshire Combined Authority's vision is to be a leader recognised nationally for our focus and commitment to equity, diversity, and inclusion. Working together for an inclusive West Yorkshire is critical to achieve the vision and addressing the inequalities people and communities experience in the region and wider.

We know that around 80% of the things that generate and sustain good health, are things outside of healthcare. As well as individual factors, social determinants have a strong influence on the health of the population. This includes the conditions in which people are born, grow, work, live, and age, and the wider set of forces and systems shaping the conditions of daily life.

Good health is vital to an enjoyable and meaningful life, free from avoidable pain, anxiety and, in the worst cases, premature death. But it is also a crucial determinant of

our economic prospects, both at an individual, local, regional and a national level.

Mitigating against the structural obstacles to good health through civic action is a key to reducing health inequalities. This includes use of legislation, regulation, taxation and licensing within devolved local powers to help make healthy choices easier for people. Local government focus on improving this level of intervention needs to be targeted appropriately to reach all relevant parts of the population.

It is clear, that the contribution of combined authorities, and local authorities are hugely influential in the health of the population, and any powers and resources that are within the control of these institutions should be looking at ways of positively maximising their impact on the population's health.

There are a number of ways in which the Investment Priorities (IP) contribute to health outcomes which are set out in each of the IP tables below:

As such, all schemes will need to demonstrate that equity, diversity and inclusion have been considered and record how this has impacted the decisions made, through application of equality impact assessments. Importantly, that schemes document the interventions needed to achieve positive outcomes and mitigate any negative impacts. All must evidence that the proposal has due regard for diverse people and communities, including but not limited to groups of people with the following Protected Characteristics as defined in the Equality Act 2010: age, gender, race, gender reassignment, disability, marriage and civil partnership, pregnancy and maternity, religion or belief and sexual orientation. Equality Impact Assessment and associated toolkits, empowers an integrated approach to adopting the principles at the earliest point of inception, to better understand the dynamics between people and communities, as well as interactions between additional cross cutting themes including inclusive growth and socio-economic factors, as well as addressing climate change and environmental factors.

Encouraging an intersectional lens to gain greater insight into the nature of impacts for people and communities and what the conditions are to embed positive outcomes for people and the environment.

In order to achieve our vision, and address regional inequalities, working together for an inclusive West Yorkshire is critical. Our legal responsibilities through the Equality Act and Public sector Equality Duty contributes to our underpinning approach, and framework, being the Equality Framework for Local Government. Though, our ambition is to proactively and through an intersectional lens embed inclusion in all we do, above and beyond legislative duties. We strive to:

- Shape key priorities and work toward cradling a progressive & evolving culture
- Build on best practice from partners including local authorities
- Build skills, knowledge and understanding of services that will improve the evidence base for determining local EDI priorities
- Strengthen capabilities within the organisation and the region
- Deliver new strategies for community engagement, access, and participation

Evidence impact against the Local Government Equality Framework and the segments: Leadership & Organisational Commitment, Diverse & Engaged Workforce, Understanding and working with our communities, Responsive Services and Customer Care.

### 5.3 Investment Priorities

Investment Priority 1 - Good Jobs and Resilient Businesses					
KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A ZERO CARBON ENVIRONMENT.					
<p>On 11th August 2020 it was confirmed that the UK economy had entered an official recession for the first time in 11 years, suffering its biggest slump on record between April and June 2020, with GDP shrinking 19.8% compared with the first three months of the year. Whilst overall economic recovery in the UK has been strong since, growing above pre-pandemic size in November 2021, the resilience of the economy remains fragile, with High levels of inflation and energy price rises continue to present major concerns for individuals and businesses in 2023. While levels of employment are high, A much tighter labour market, with employment up 31,000 from pre-pandemic, this positive picture this masks trends of both ongoing issues of recruiting critical skills and also in the numbers of people who have been unemployed for a significant period. Investment Priority 1 puts increased productivity and innovation as central to a more resilient and diverse West Yorkshire economy that can grow and offer quality employment even in these challenging conditions, but only in a way that contributes to increased living standards as the outcome that matters.</p> <p><b>Contribution to health outcomes :</b> Good Jobs and Resilient Businesses support health outcomes by promoting economic stability, providing access to healthcare, reducing stress, enabling work-life balance, ensuring occupational health and safety, and enhancing community well-being.</p>					
ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS	
				Outputs	Results
<p><b>Mission one: A prosperous West Yorkshire - an inclusive economy with well-paid jobs</b></p>	<ul style="list-style-type: none"> <li><b>Building resilience across strategic regional sectors</b> - hard hit by COVID-19, BREXIT, climate change pressures, energy costs and inflationary pressures - existing jobs will not be safeguarded and new good job opportunities not created which are needed <del>as part of the rescue or re-imagining of the West Yorkshire economy</del>; this includes those in low carbon and energy efficiency sectors.</li> <li><b>Deliver levelling up through increased productivity</b> in good work through all businesses. Increasing productivity to both increase economic output and better living standards and support the consequences of increased automation and digital transformation.</li> <li>Prior to the pandemic the region had the fastest growing digital sector in the country (employment growth of 48% between 2015 and 2018), and previously identified strengths in health tech and food production which are now at the forefront of the recovery. Yet output per hour worked is largely unchanged since 2010 in West Yorkshire, once the impact of inflation is removed, and remains about 14% lower than UK levels. Productivity remains the key long-term route to improved living standards but must be done in a way that unlocks good work - 271,000 WY employees (29% of the total) were not in good quality work (ONS definition based on Taylor Review) before COVID-19 and response has shown just how important relationships between employers and employees can be.</li> <li><b>Making supply chains more resilient</b> - a third of businesses say disruption to their supplier base poses a risk to their business operating successfully as lockdown eases, made worse now by increased inflation, conflicts and energy prices.</li> <li><b>Increasing entrepreneurialism</b> -entrepreneurialism has been a critical driver of economic growth out of difficult times, and West Yorkshire has the ingredients. Annually the region generates more than 10,000 start-ups. Many of these businesses are innovating in response to COVID-19 and other challenges, in sectors identified as local strengths pre-COVID, including food &amp; drink, health tech, creative &amp; digital and professional services. Digital skills, mission led innovation and a renewed focus on pre-start and start-ups will be critical to the region's ongoing resilience, seizing new opportunities as they arise and attracting talent into the region from elsewhere.</li> <li><b>Stimulating investment to support Equity, Diversity and Inclusion in business finance:</b> There is evidence to suggest a gap in equity finance for businesses in West Yorkshire in both supply of and demand for access. Further evidence highlights the discrepancies in access to equity finance for particular groups including female-led businesses and ethnic minority-owned businesses.</li> </ul>	<ul style="list-style-type: none"> <li>Safeguard jobs and create new job opportunities.</li> <li><del>As we move into re-imagining our economy, the focus should increasingly look to</del> Moving people into longer-term career progression pathways, offering support to access growing employment opportunities in digital and clean growth roles.</li> <li>Good Work through more inclusive employment environments and interventions, recognising the role played by Trade Unions and other employee bodies and the Fair Work Charter, including programmes commissioned at a regional level.</li> <li>Coupled with recovery from COVID-19, the UK's transition to a post-Brexit independent trading status makes it more important than ever that the region has the resilient supply chains needed both for businesses and consumers to thrive.</li> <li>Innovation as a key route through challenging conditions – adaption, diversification and innovation for survival and future growth and make WY the best place in the UK for businesses to innovate and export.</li> <li>Increase the size of the WY business base relative to population - supporting survival beyond the first year will be a key success measure.</li> <li>Improve skills and boost employment and productivity in growth sectors.</li> <li>Increase employer and individual investment in skills.</li> <li>Create an aspirational, innovative enterprise and inclusive culture to reduce levels of deprivation.</li> <li>To connect vulnerable groups and residents living in deprived communities to economic opportunity.</li> </ul>	<ul style="list-style-type: none"> <li>Support the creation of good quality jobs in sectors with growth and higher productivity potential (in line with the Business Productivity and Resilience Plan) including through inward investment and export/trade. Promote good work through the development of the Fair Work Standard, focus on those jobs which offer social mobility, sectors/businesses with decarbonisation plans and growth in high skills roles and 'green' businesses and the transition to net-zero.</li> <li>Support entrepreneurs by providing appropriate support to help people to create and grow businesses – including promoting and facilitating Social Enterprise/ alternative business models / 'quality' self-employment as an option for disadvantaged groups and individuals in our most deprived communities, providing appropriate support mechanisms to do this.</li> <li>In line with the Innovation Framework, provide support for businesses seeking investment to innovate, explore new market opportunities or adopt new technology, particularly to grow jobs in areas of regional strength or tackle societal challenges, prioritising health innovation and clean growth tech particularly to close health and wellbeing inequalities.</li> <li>Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<ul style="list-style-type: none"> <li>Number of businesses receiving support.</li> <li>Number of new businesses established,</li> <li>Number of start-ups/scale ups.</li> <li>Employment increase in supported enterprises</li> <li>Number of employed (including self-employed) new start-ups (Including alternative business models)</li> <li>Estimated GHG reduction.</li> <li>Number of businesses who are innovation active</li> <li>Increased R&amp;D business investment</li> <li>Increased number of higher skilled/ higher paid roles (above L3).</li> </ul>	<ul style="list-style-type: none"> <li>Increase in productivity.</li> <li>Increase in jobs created paying at Living Wage.</li> <li>Increase in business start-ups.</li> <li>Supporting the move to a low carbon economy.</li> <li>Improved income levels and poverty reduction through Fair Work.</li> <li>Increase output per hour worked (productivity)</li> <li>Technology adoption</li> <li>Total employment /share of employment in relevant sectors eg. low carbon</li> <li>Share of employment in disadvantaged groups.</li> <li>Diversity in strategic sectors</li> <li>% into good quality work</li> <li>% supported in green/ net zero transition</li> <li>% of Health tech start ups</li> <li>1-year survival rate &amp; confidence</li> <li>Increase in business R&amp;D spend</li> <li>Number of innovations for social good, especially health innovation</li> <li>Start-ups tackling environmental challenges / innovation</li> <li>Stock of enterprises in deprived neighbourhoods</li> </ul>

## Investment Priority 2 – Skills and Training for People

### KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A ZERO CARBON ENVIRONMENT

The Combined Authority is committed to action on the long-standing challenges that West Yorkshire faces in terms of social exclusion, inactivity, inequality and ill health. This Investment Strategy, in line with the Employment and Skills Framework, AEB strategy, emerging digital skills plan and Green Jobs Taskforce findings, therefore supports skills projects which drive inclusive growth and social value and aim to ensure that communities and residents benefit from growth and have the opportunities they need to succeed and contribute on a more equal and fairer basis.

West Yorkshire faces structural challenges arising out of high levels of economic inactivity, particularly for groups who face disadvantage in the labour market. Labour market prospects remain uncertain (despite recent increases in employment), with a variable situation across local authority areas. Recent changes in economic trends – such as the growing role of AI/Automation, the growth of the Green economy, and the ever-rising need for Digital Skills for economic participation - point to a risk of an increase in demand for employment support services. Similarly, a rise in the claimant count points toward increased engagement with employment support services. West Yorkshire's overall employment rate is below the national average, and disadvantaged groups (e.g. disabled people, some ethnic minority groups, people qualified below Level 2, those aged 50-64) face below average employment rates. The number of NEETs across the region is also rising, and sits at higher levels than national averages.

West Yorkshire also faces a basic skills challenge on a significant scale, with a deficit of numeracy and basic Digital skills both key elements of this. The rate of those qualified below Level 2 has been in steady decline in West Yorkshire, but still falls above the national average. Similarly, the percentage of people qualified at Level 4 and above is below the national average. As such, there are skills challenges for West Yorkshire at both higher and lower level.

The Combined Authority is committed to supporting more people into work, removing barriers to those furthest from the labour market and supporting employers to invest in skills and training. The Employment Support Framework sets out this top tier ambitions, with a detailed strategies for Adult Education Budget, Digital and Green Jobs and Skills.

**Contribution to health outcomes :** Skills and training for People in various health-related domains have a direct impact on health outcomes. Additionally, by equipping individuals with the knowledge, tools, and abilities to make informed decisions, access appropriate care, and promote health in their communities, we can collectively work towards better health outcomes for all.

ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS	
				Outputs	Results
<p><b>Mission 1: A prosperous West Yorkshire - an inclusive economy with well-paid jobs</b></p>	<ul style="list-style-type: none"> <li>• <b>Support the under and unemployed towards and in work back-to-work</b> – despite a tight labour market as we exit the pandemic Whilsy employment rates remain relatively stable and unemployment remains similar to national levels there are key employment gaps across all protected characteristics , with WY performance below England in all areas. The Claimant count amongst those seeking work, and in work has been steadily increasing recently. <del>the number of claimants has remained similar to pre-pandemic levels in most areas of West Yorkshire. The current West Yorkshire claimant count for April 2022 of 74,200 is 31% higher (+17,700) than its pre-crisis level (in February 2020).</del> There are indicators that youth unemployment Young people (18-24) is beginning to rise <del>have been amongst the worst affected. and are further impacted by a reduction in take-up of apprenticeships amongst under 19s – and 19–24 year olds. Economic inactivity challenges remain, with high numbers of over 50s leaving the labour market.</del></li> <li>• <b>Prevention of NEETs</b> - Action is required to prevent young people disengaging from employment, education and training ('NEET levels'). which had fallen significantly over the past few years but has increased during the pandemic <b>and remains above England average.</b> Collaboration across West Yorkshire on this agenda is important to ensure that early preventative work is undertaken minimise the risk of becoming NEET.</li> <li>• <b>Level up access to learning</b> – participation in adult skills are in long -term decline with participation falling by 36% in West Yorkshire since 2014/15. <del>Training achievements have fallen during the pandemic. Disadvantaged / pupil premium learners in schools trail their peers by 18.1 months in attainment.</del> Twice as many people in professional occupations undertake training as in manual occupations.</li> <li>• <b>Building a strong skills offer for the West Yorkshire labour market that matches the needs of our learners and employers</b>- there is a need to plan, adapt and provide for a changing market. There is a need for skills and training providers to be responsive to employer demand and align with the strategic adult skills priorities for the region.</li> </ul>	<ul style="list-style-type: none"> <li>• Support for multi-agency working to address those with multiple barriers to good work including skills, health and employability. This includes under-represented groups such as young people, neurodiverse, disabled, parents / carers – particularly female,</li> <li>• Preventative and targeted support available for those at risk of becoming NEET as they leave the education system.</li> <li>• Investment in the equipment and staff</li> <li>• Support for curriculum delivery, to respond to employer and learner needs</li> <li>• Support individuals to access developmental learning including 'digital skills for life' through different formats and settings that builds confidence, self-esteem and supports social inclusion. This includes places of learning such as community settings.</li> </ul>	<ul style="list-style-type: none"> <li>• Improve employment support for individuals furthest from the labour market, with a focus on inclusivity so that more people can progress towards and in <del>such as those with lower qualification levels and in deprived neighbourhoods towards work and the right job that allows them to progress, thrive and stay in work, whilst ensuring the needs of our most vulnerable are supported to stay in employment to reduce inequalities</del></li> <li>• Develop interventions and programmes that engage young people early and prevent them becoming NEET</li> <li>• Improve access to all age careers information and inspiration that is rooted in local labour market information and reflects the diversity of our Region <b>and that is inclusive.</b></li> <li>• Increase effective targeting of careers information at key life stage transition points and for under-represented groups. <del>to support progression in targeted sectors.</del></li> <li>• In line with the <del>emerging</del>-Digital Skills Plan, increase provision of digital skills needed for the economy that supports SME productivity, a resilient voluntary sector, educators and digital inclusion so people have the digital skills for life and work.</li> <li>• In line with the work of the Mayor's Green Jobs Taskforce, address the green skills needed for the economy in West Yorkshire - supporting the development of future skills needs, job creation and re-training to meet our climate and environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of unemployed (including long-term unemployed) participants supported.</li> <li>• Number of inactive participants supported.</li> <li>• Number gaining a qualification.</li> <li>• Number gaining employment, engaging in positive activities that address barriers to work or widen participation in training.</li> <li>• Number of Employers engaging with schools.</li> <li>• Number of NEETs / post-education destinations.</li> <li>• Number of NEETs in disadvantaged groups supported.</li> <li>• Number of 16-24 / 50+</li> </ul>	<ul style="list-style-type: none"> <li>• Increase % of 16-64 resident population in employment, including in disadvantaged groups.</li> <li>• Increase output per hour worked (productivity).</li> <li>• Decrease % of population aged 16-64 with highest qualification below level 2 or no formal qualification.</li> <li>• Social mobility (attainment at KS4 by FSM eligibility and access to HE by social status).</li> <li>• Levels of digital exclusion.</li> <li>• Access to net zero skills development for disadvantaged groups: apprenticeships, HE.</li> <li>• Jobs in the clean growth sector.</li> <li>• Attendance at green skills training.</li> <li>• Prevalence of "flexible" employment modes.</li> <li>• % qualified at L4+ or degree level employed in non-graduate roles.</li> <li>• Participation in employment and skills programmes and</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Delivering relevant and transferable skills needed for a changing economy</b> -. Around a fifth of people in Yorkshire and Humber lack essential digital skills for life, with the elderly, low-skilled and those on low income highly represented in that group. West Yorkshire has a high skills deficit with many adults requiring basic skills including numeracy literacy and ESOL. Demand for green skills is growing, with increases in the number of jobs postings calling for green skills.</li> <li>• <b>Improved skills utilisation in the workplace</b> -. Employers will need support to identify opportunities to increase the skills of their existing workforce to drive innovation and productivity, including diverse leadership and management in order to compete effectively.</li> </ul>	<ul style="list-style-type: none"> <li>• <del>Investment in the IT equipment, infrastructure and digital skills that allows equal access to blended learning.</del></li> <li>▪ <del>Support new ways of curriculum delivery, delivering a fast response to the sharply rising demand for online and flexible learning—and to reverse the sharp decline of adult participation in learning as well as respond to employer training needs.</del></li> <li>▪ Employers need to proactively manage job design and skills so that organisations can respond effectively to continuing challenges like automation to come out of the crisis stronger, more resilient.</li> </ul>	<ul style="list-style-type: none"> <li>• Support productivity and innovation by addressing the low take up of STEM subjects – improving skills levels amongst key groups who do not traditionally take up STEM.</li> <li>• Deliver impartial skills support for employers that makes best use of workforce skills, addresses skills shortages, encourages employer investment and workforce planning.</li> <li>• Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<p>unemployed in disadvantaged groups supported.</p> <ul style="list-style-type: none"> <li>▪ <b>Number of residents from deprived communities supported.</b></li> </ul>	<p>across disadvantaged groups.</p> <ul style="list-style-type: none"> <li>▪ <b>Reduction of disparities in unemployment between deprived and non-deprived neighbourhoods</b></li> </ul>
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## Investment Priority 3 – Creating Great Places and Accelerated Infrastructure

### KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A ZERO CARBON ENVIRONMENT

Despite a thriving economy, not all parts of the community in West Yorkshire are feeling the benefits of growth, with increasing polarisation between places. Investment is needed in places in a coordinated way, to maximise the benefit of the investments and ensure that the benefits of economic growth are felt by all. For example, the West Yorkshire economy is growing, creating opportunities for good quality high skilled jobs, however for local residents to take advantage of these, places need to be connected with excellent quality transport and digital infrastructure. The success of our places is also dependent on infrastructure which enables our communities to be resilient to future change, socially, technologically as well as economically, making them good places to live and work. Although individual programmes of investment by infrastructure type, are prioritised, programmes are linked wherever possible to ensure that a place-based approach is being taken to investment and maximising the return on that investment. Infrastructure has a critical role to play in recovery, both in unlocking economic opportunities with good jobs and skills, and in delivering longer term resilience for West Yorkshire, both for the communities of West Yorkshire and for its environment. It will be important to ensure infrastructure delivers for the people of our communities, and that the social and cultural infrastructure is built and retained that makes the distinct places of West Yorkshires towns and City environments where people want to live, work and visit.

**Contribution to health outcomes :** *Creating Great Places and Accelerating Infrastructure can lead to healthier populations by promoting physical activity, improving access to healthcare and nutritious food, enhancing mental well-being, and reducing environmental risks and hazards.*

ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS	
				Outputs	Results
<p><b>Mission 2: A happy West Yorkshire – great places and healthy communities</b></p> <p><b>Mission 5: A safe West Yorkshire – a region where all can flourish</b></p>	<ul style="list-style-type: none"> <li>▪ <b>Levelling up West Yorkshire</b> - COVID-19 has diverted attention from the levelling up agenda for the north but has now become even more acute in terms of deprived communities that already needed targeted investment to deliver resilience for the future. Public spending per head on economic affairs in Yorkshire was around 70% of UK levels in 2017/18. Meanwhile Gross Disposable Household Income is 81% of UK levels in West Yorkshire.</li> <li>▪ <b>Post COVID Ready Places</b> - The challenges will be different for our major urban centres, Bradford, Halifax, Huddersfield, Leeds and Wakefield as they will be for our smaller towns and rural settlements. As the economy opens up there will be a need to regain confidence in these centres as they are rebuilt as safe public places. Research also suggests that whilst remote working and lower density office space will remain desirable, companies and workers will still demand spaces that promote collaboration, interaction and wellbeing. This will require flexibility to respond to a potential further rapid contraction of retail and commercial use in towns and cities using transitional uses to try and test what works best for different places, including how culture can play a central role in making cities, towns and high streets places people want to be. Some places will need large scale interventions to create future markets, with brownfield sites (largely within urban cores) brought forward to provide a good quality affordable housing offer, alongside the social infrastructure to make good places to live.</li> <li>▪ <b>Resilient Communities</b> - COVID-19 has reinforced powerfully the need for holistic approaches to developing resilient, healthy, safe communities with local green space for all communities to use. 64% of people expect to work from home more in the future than prior to lockdown according to our transport survey, whilst more than a fifth (22%) of businesses expect the move to home working to be in place permanently. <b>Ensure recovery from domestic related crime and extend support for victims and survivors and their mental and emotional well-being.</b></li> <li>▪ <b>Cultural and creative sectors</b> - important in their own right in terms of their economic footprint and employment, spurring innovation as well as</li> </ul>	<ul style="list-style-type: none"> <li>• Capital investment (including on transport) undertaken with existing communities, addressing the needs of people including a role in the development (through design, jobs &amp; training) and to genuinely benefit from its results (through healthier, positive and greener places).</li> <li>• Commission research and innovation activities to support enhancements to the resilience of places to flooding and the impacts of climate change</li> <li>• To accelerate the transformation of our towns, cities and rural areas into successful, sustainable places.</li> <li>• To strengthen existing places and build on learning from district Streets for People pilots, Safer Streets initiatives for safer public spaces, and the opportunity to increase flood resilience for the communities that have faced devastating impacts in the events of 2015 and 2019.</li> <li>• Create new developments, giving priority to the design of future-proofed homes, including space for working/study.</li> <li>• <b>Commission high quality accessible victims, survivors and witnesses support services</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Develop a long-term future proofed housing and employment pipeline, supporting site remediation and development within Spatial Priority Areas – improving connectivity to jobs and providing different types of affordable housing and tenure for our residents.</li> <li>▪ Accelerate business case development and delivery of Flood Risk Management (including Natural Flood Management) schemes as part of a wider approach to climate change mitigation, resilience and carbon sequestration.</li> <li>▪ Providing enhanced flood protection to business areas</li> <li>▪ Improve access to digital infrastructure with a focus on gigabit capable broadband and 5G mobile connectivity for businesses and residents in hard to reach areas.</li> <li>▪ Addressing digital exclusion by improving access and take up of digital facilities and online services to support those most deprived residents and SME businesses, support safety in the public realm, promoting both personal and business digital safety.</li> <li>▪ Supporting the delivery of the Smart City agenda, using Internet of Things (IoT) where appropriate</li> <li>▪ Enhance the sustainable vitality of cities and towns, delivering new housing and employment opportunities accessible to local residents - including investment in green infrastructure, energy efficiency, low carbon heating and power</li> </ul>	<ul style="list-style-type: none"> <li>▪ New homes enabled and completed within SPA's</li> <li>▪ Hectares of land remediated and prepared for development.</li> <li>▪ Number of premises with enhanced flood protection</li> <li>▪ Number of premises connected to gigabit capable broadband.</li> <li>▪ Commercial property occupancy,</li> <li>▪ Number / share of green jobs.</li> <li>▪ Jobs accessible by public transport from deprived communities.</li> <li>▪ Space created for cultural and arts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increased government investment.</li> <li>▪ Increased investment in R&amp;D.</li> <li>▪ Decrease in households in transport poverty.</li> <li>▪ Access to gigabit capable broadband in deprived areas.</li> <li>▪ % without basic digital skills.</li> <li>▪ Reduction in CO2 and NOx (other air quality where relevant).</li> <li>▪ <del>Increased mode share for active / sustainable modes.</del></li> <li>▪ <b>Mode share moving from car use to public transport and active travel</b></li> <li>▪ Reduction in fuel poverty.</li> <li>▪ <b>Improved energy efficiency of homes including in deprived neighbourhoods</b></li> <li>▪ West Yorkshire communities are safe, climate resilient, just and inclusive.</li> </ul>



	<p>contributing to numerous other channels for positive social impact (well-being and health, education, inclusion, town regeneration etc). They have also been among the hardest worst hit by the pandemic with large cities often containing the greatest share of jobs at risk devastated by the pandemic.</p> <ul style="list-style-type: none"> <li>▪ <b>Accessibility and Connectivity to Communities</b> - COVID-19 has demonstrated what a radical shift in work, transport and community activity means for our current infrastructure. People are using the rail network differently with reduced commuting offset against an increase in leisure travel. As a result weekday passengers numbers are around 80% of pre-pandemic levels and up to 130% on a weekend.. If positive behaviours for our environment of reduced car usage, more active travel, greater home working and more local spending are to be retained in a sustainable way, then the regions connectivity infrastructure needs to support that.</li> <li>▪ <b>Addressing New Challenges</b> - Recovery offers a specific opportunity to both support the transition and meet our net zero carbon target and to stimulate jobs and skills opportunities, through addressing existing issues in the regions housing stock through public investment. Producing high performing energy efficient homes is an opportunity to build on the existing strengths of the region in Modern Methods of Construction, stimulating MMC home building programmes linked to training and investment in new technology. Alongside this, retrofit energy efficiency programmes are needed for existing buildings, offering a long-term solution to tackling fuel poverty in the region (fuel poverty affects more than 20% of households in 100 of our communities) and an opportunity to create high numbers of skilled, good jobs.</li> </ul>	<ul style="list-style-type: none"> <li>• To keep communities connected, particularly to work and training opportunities, connect communities digitally, socially and through sustainable modes of transport.</li> <li>• Support a thriving cultural, arts and sporting sector vital for the West Yorkshire economy - shaping place identity and profile, and attracting and retaining talent and investment, driving inclusive growth, regenerating places and engaging people to develop skills.</li> <li>• To reduce inequalities by tackling the number of properties especially in the 20% most deprived areas who have no or little access to Superfast Broadband and only 3% to Full Fibre.</li> <li>• Reduction in fuel poverty.</li> </ul>	<p>measures and culture – developments to include better urban design (excessive traffic, noise and air pollution, poor road safety, low levels of active travel) to make streets in our most disadvantaged areas and amongst particular groups to become more 'people friendly'. Embed the Vision Zero Road Safety approach throughout West Yorkshire.</p> <ul style="list-style-type: none"> <li>▪ Community based interventions including those which improve community safety, community and capacity building. Improved access to and quality of local green spaces including asset transfer and connectivity and active travel opportunities.</li> <li>▪ Protect businesses, the environment and improve air quality by ensuring local, competitive and resilient clean energy supplies that allow the region to be more self-sufficient in meeting energy needs – incl. investment in green and flexible local energy systems and integrated into new developments and transport infrastructure – improving health outcomes for all and narrowing health inequalities.</li> <li>▪ Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<p>activity within SPAs</p> <ul style="list-style-type: none"> <li>▪ Victims and survivors access services to meet their needs.</li> <li>▪ Innovation programmes completed</li> </ul>	
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## Investment Priority 4 – Tackling the Climate Emergency, and Environmental Sustainability

### KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A NET ZERO CARBON ECONOMY.

The Combined Authority has declared a climate emergency and has set an ambitious target for the region to be net-zero carbon by 2038, with significant progress by 2030. There is recognition that achieving the target will unlock significant economic benefits such as good, green jobs (71,000 potential jobs across West Yorkshire according to the LGA); training and upskilling opportunities; increasing the size of the low carbon and environmental goods and services sector, whilst reducing harmful emissions, delivering nature recovery, and improving long-term climate resilience. Achieving the target will require annual emission reductions of up to 14.5 percent and significant action across all parts of the economy. Progress to deliver against the target at the pace and scale necessary has been hampered by a lack of investment and funding ready net-zero carbon and environmental projects and the resources to undertake programme and project development activities, obstacles that will need to be overcome if the ambition is to be met.

COVID-19, particularly during lockdown, has seen some pro-environmental behaviours, however as we emerge from the pandemic we need to ensure that the recovery is a green one. Embracing a green recovery will ensure the region can take advantage of the opportunities that a transition to a net-zero carbon economy will bring, including over 71,000 potential jobs in West Yorkshire alone by 2050 in the low carbon and renewable energy economy (LGA, 2020).

**Contribution to health outcomes :** Tackling the Climate Emergency and Promoting Environmental Sustainability can have wide-ranging and profound effects on public health, from reducing the burden of chronic diseases to enhancing mental well-being and community resilience. It highlights the interconnectedness of human health and the health of the planet and emphasises the need for comprehensive and collective efforts to create a sustainable and healthy future.

ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS?	
				Outputs	Results
<p><b>Mission 3: A well-connected West Yorkshire – A strong transport system</b></p> <p><b>Mission 4: A sustainable West Yorkshire – making lives greener</b></p>	<ul style="list-style-type: none"> <li><b>Achieving net-zero carbon by 2038:</b> The scale of the challenge to meet net-zero carbon should not be underestimated, with a up to 14.5% reduction in emissions required year on year. This will require a significant upscaling of activity across all sectors of the economy.</li> <li><b>Delivering against the priorities of the West Yorkshire Climate and Environment Plan:</b> The <a href="#">adopted Plan</a> identifies eight priorities for delivery and focuses on 39 proposals across these priorities that need to be progressed over the next three years. This represents a significant amount of activity to be delivered over a short timeframe, but while challenging is necessary if the region is to remain on track to meet its emission reduction target and address the climate emergency.</li> <li><b>Addressing stubborn emissions in the transport and building sectors:</b> Over two thirds of emissions in the region are from these two sectors with progress to decarbonise being slow. To meet the regional target in the transport sector we will need to see over 20% reduction in private car use with significant increases in active travel (walking and cycling) and public transport, and a rapid transition to zero-emission vehicles. From a building perspective, we will need to see energy efficiency and low carbon heating and power technologies deployed at pace and scale, along with the infrastructure that facilitates the transition.</li> <li><b>Delivery at pace and scale:</b> The scale of the challenge is significant and will require a rapid upscaling of activity, resources and funding. For example, to meet the net-zero carbon target nearly 700,000 of the region's homes (out of a housing stock of just over 1 million) will need some form of energy efficiency retrofit and low carbon heating technology.</li> <li><b>Project development funding and pipeline:</b> The ability to generate investment and funding ready low carbon and environmental projects has been hampered by the lack of funding to take projects from the point of concept to the point of investment and implementation. As a result, the region is currently lacking a pipeline of investable projects that can contribute to achieving the regional target. Having this pipeline, and for it to be developed sufficiently to be attractive to investors and funders, will be crucial if the region is to make inroads into achieving its net-zero carbon ambition.</li> </ul>	<ul style="list-style-type: none"> <li>Reduction in regional emissions across all sectors of the economy in line with ambition to be net-zero carbon by 2038.</li> <li>Recovery and enhancement of nature and increases in biodiversity, green spaces and trees, and natural environments.</li> <li>Increase in the number of zero carbon and environmental projects being developed and implemented in the region.</li> <li>Alignment with complementary jobs and skills programmes to support the development of local supply chains that underpin delivery action whilst supporting the economy and communities to recover after COVID-19.</li> <li>Increase in the amount of funding and resources flowing into and being generated in the region as part of the net-zero carbon economy.</li> <li>Warm, healthy, affordable and low carbon homes, energy efficient workplaces.</li> <li>Reduction in the proportion of households in fuel poverty, improving the living standards of residents.</li> <li>More local, clean, and flexible energy</li> <li>Reduction in energy and fuel costs for residents and businesses within the region.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a long-term future proofed pipeline of schemes that contribute to addressing the climate emergency and accelerates delivery of the eight themes of the Climate and Environment Plan.</li> <li>Build expertise, capacity and capability across the regions current and future workforce to ensure it is able to service the transition to a sustainable, net-zero carbon and climate resilient economy, with a particular focus on those that stand to lose most as a result of the transition (<i>See also relevant priority areas for investment under IP1 and IP2</i>).</li> <li>Capitalise on the academic knowledge and expertise in the region to develop and support innovation that increases the ability of the region to meet its net-zero carbon target and contribute to nature recovery and climate readiness (<i>See also relevant priority area for investment under IP1</i>).</li> <li>Support the deployment of infrastructure that facilitates the transition to a sustainable, net-zero carbon and climate resilient economy, including across transport, homes, business, industry, energy generation, the natural environment and climate resilience (<i>See also relevant priority areas for investment under IP3 and IP5</i>).</li> <li>Assist and support the acceleration of activity to ensure homes in West Yorkshire are healthy, affordable, energy / water efficient and ready for changing climate. This could include support for the customer journey, embedding quality and real life performance, demonstrators and unlocking green finance (<i>See also relevant priority areas for investment under IP1, IP2 and IP3</i>).</li> </ul>	<ul style="list-style-type: none"> <li>Reduction in proportion of households in fuel poverty.</li> <li>Increase in percentage of employees in direct work.</li> <li>Increase in gross disposable household income.</li> <li>Reduction in CO<sub>2</sub> emissions (per capita and by sector).</li> <li>Increase in energy efficiency of homes and workplaces.</li> <li>Increase in local clean energy generation and demand met from clean energy sources.</li> <li>Increase in green and blue infrastructure and nature</li> <li>Reduction in average number of trips by private car</li> </ul>	<ul style="list-style-type: none"> <li>Reduction in CO<sub>2</sub> emissions (ktCO<sub>2</sub>)</li> <li>CO<sub>2</sub> emissions (ktCO<sub>2</sub>) by sector.</li> <li>Emissions intensity ratio.</li> <li>Access to Green and Blue infrastructure and nature.</li> <li>Building energy efficiency, including in deprived neighbourhoods.</li> <li>Supporting the move to a low carbon economy.</li> <li>Increased government investment.</li> <li>Increased mode share for active / sustainable modes.</li> <li>Mode share moving from car use to public transport and active travel</li> <li>Access to public transport network.</li> </ul>

	<ul style="list-style-type: none"> <li>▪ <b>Capitalising on employment opportunities from the transition to net-zero:</b> The LGA have estimated that meeting the UKs net-zero target by 2050 could result in over 71,000 jobs in the low carbon and renewable energy economy in West Yorkshire by 2050. We need to capitalise on this opportunity by creating the conditions in which these employment opportunities can be realised.</li> <li>▪ <b>Ensuring a 'Just' Transition:</b> We need to ensure that no one is disadvantaged as a result of the transition to net zero carbon, particularly those most vulnerable in society, and appropriate support is provided to enable everyone to participate in a fair, equal and inclusive net-zero carbon economy.</li> <li>▪ <b>Climate resilience:</b> A certain degree of warming is already locked in, regardless of the action we take in achieving net-zero carbon. As a result we need to ensure our homes, businesses and developments are protected and resilient to the effects of a changing climate e.g. increased flooding, heatwaves.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ensuring the region is adapted and resilient to the worst impacts of a changing climate.</li> <li>▪ Improved productivity (output per hour worked).</li> <li>▪ Healthier and productive people</li> </ul>	<ul style="list-style-type: none"> <li>▪ Support (both generic and bespoke) for business and industry, large and small, to make the right decisions and implement the appropriate solutions when it comes to decarbonisation, resource efficiency and circularity (<i>See also relevant priority areas for investment under IP1</i>).</li> <li>▪ Reverse the decline in, and support activity that enhances, the quality of the regions natural environment while delivering multiple benefits for West Yorkshire's residents, communities and businesses (<i>See also relevant priority areas investment under IP3</i>).</li> <li>▪ Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Number of premises with enhanced flood protection</li> </ul>	
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# Investment Priority 5 – Delivering Sustainable, Integrated, Inclusive and Affordable Transport

## KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A ZERO CARBON REGION.

Transport has an enabling role to play in addressing many of the challenges we face in West Yorkshire in providing access to good jobs for all and in particular the role of sustainable modes of transport including public transport, active travel and shared mobility in providing access to employment and education for those in our most disadvantaged communities. The importance of a shift from a car-dependent region as the highest emitter of carbon with around 70% of journeys to work being made by car public, means transport plays a critical role in helping reach our zero carbon ambitions. Despite recent and future potential investment, further planned investment in the existing road network congestion relating to an over reliance on car trips will continue without investment in other modes of transport. Cycling, walking, road, rail, bus and a new form of mass transit all have an important role in meeting future transport demands. West Yorkshire has a target to become a net zero carbon economy by 2038 and this will not be achievable without significant decarbonisation within the transport sector. Pre COVID-19, with the climate emergency, our inclusive growth aspirations, and the challenge of reducing the productivity gap facing the region, demands were increasing from our transport networks. Therefore, the investment priorities to aid recovery stand alongside the regions existing Transport Strategy ambitions and emerging regional strategy work on connectivity, rail, future mobility, and mass transit. Changing travel patterns and future growth as well as the cost of living crisis will also be addressed by our investment priorities to meet the ambitions of our Local Transport Plan.

For bus passengers, we have a vision for an effective, accountable, and affordable service that works for the people of West Yorkshire. The Combined Authority has started the process of bringing buses back into public control and the process of a franchise assessment. We will continue to work towards cheaper, simpler bus fares, green buses and a more reliable services in partnership with the bus operators whilst this work progresses. Reliable, affordable, sustainable transport is essential to enable people to access skills and job opportunities, particularly those who face disadvantage, to tackle the climate emergency and to raise our region's productivity. We are shaping our skills, inclusive growth, business support and wider infrastructure programmes to contribute to these objectives. This holistic approach will ensure we have a more significant and meaningful impact on people's lives, on the ability of our businesses and the economy to grow, and on the environment. Our current transport investment programmes, including CRSTS and Transforming Cities Fund alongside other transport related funding streams set out in Appendix 1 such as Active Travel Fund, are part of this overall approach package is part of this overall approach and supported through this priority.

**Contribution to health outcomes :** Delivering Sustainable, Inclusive, and Affordable Transport options can have far-reaching health benefits. It not only improves physical health through increased physical activity and reduced air pollution but also enhances mental well-being, social inclusion, and overall quality of life for individuals and communities. Additionally, it contributes to the broader goal of mitigating climate change, which has implications for global health and well-being.

ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS	
				Outputs	Results
<p><b>Mission 3: A well-connected West Yorkshire – A strong transport system</b></p> <p><b>Mission 4: A sustainable West Yorkshire – making lives greener</b></p>	<ul style="list-style-type: none"> <li><b>Tackling persistent poverty and stalled living standards.</b> The deprivation profile of West Yorkshire has remained relatively unchanged in 15 years – there are persistent pockets of deprivation which aren't improving and considerable spatial inequalities.</li> <li><b>Transport impacting access to jobs and training.</b> Access to employment and training opportunities is curtailed by an inadequate transport offer which has not kept up with changing needs and travel patterns and does not offer realistic alternatives for the car. Our most disadvantaged communities, which have the lowest levels of car ownership and experience 'Transport poverty' suffering from poor transport affordability and accessibility.</li> <li><b>Reducing the productivity gap.</b> West Yorkshire lags behind the UK average for productivity. <ul style="list-style-type: none"> <li>Transport is our highest emitting sector contributing to climate change, contributing 44% of regional CO2 emissions. These emissions are predominately from road transport, particularly private vehicles and freight movement. In addition to greenhouse gases, our transport system has local impacts on people's health and nature, through poor air quality and noise, as well as road danger severance and loss of habitat.</li> </ul> </li> <li><b>Transport constraining growth.</b> West Yorkshire's population and economy is expected to grow in the future – especially with major investments such as the Transpennine rail route upgrade, but the current transport system lacks the capacity to accommodate existing and future demand and fails to provide the choice, connectivity and resilience our region needs to support growth and that would have been better met if major investment like HS2 and Northern Powerhouse Rail was delivered in full. <del>HS2 and Northern Powerhouse Rail (NPR) – but the current public transport provision lacks the capacity to accommodate the existing and future demand.</del></li> <li><b>Making sustainable travel the obvious choice.</b> Our reliance on the car is damaging business, the environment and the health of residents. We need substantial long-term public investment in</li> </ul>	<ul style="list-style-type: none"> <li>Transform access for our communities experiencing persistent poverty to employment opportunities and skills centres, through sustainable forms of transport such as public transport, active travel and shared mobility.</li> <li><del>Make travel by bus an effective, accountable, and affordable offer.</del></li> <li><del>Transform access for our communities of persistent poverty to employment opportunities and skills centres.</del></li> <li>Significant reductions in impacts of our transport system, in particular reduced carbon emissions and local air quality and noise impacts, through reduced car use and decarbonisation of our transport fleet.</li> <li>Create safer, clean and liveable places which improve our people's health and wellbeing supporting cycling and walking the first choice for short journeys <del>accessing town and city centres – improving air quality</del> reducing car dominance.</li> <li>Transform the public transport, active travel offer and shared mobility from housing and employment sites, ensuring that people are enabled to make</li> </ul>	<ul style="list-style-type: none"> <li><del>TCF programme (other transport funding does this too, Active Travel, CRSTS, WYTF, LTP) – provide gap funding as required</del> Connect people to economic and education opportunities through affordable, sustainable transport and helping to create cleaner, healthier and happier communities.</li> <li><del>From the Connectivity Plan</del> – Delivery of measures to reduce carbon by enabling more walking, cycling, bus and rail use through safe and convenient provision highway priority and investment in marketing, ticketing and services – improve transport access, affordability and reliability for low paid in deprived communities and disadvantaged groups.</li> <li>Transform our transport fleet and decarbonising the system through investment in low and zero emissions vehicles, as well as mode shift from car and road freight to more sustainable alternatives.</li> <li>Continue progress towards bringing buses back into public control.</li> <li>Developing a mass transit system for West Yorkshire.</li> <li><del>From the Connectivity Plan</del> – Maintenance and enhancement of our transport assets across highways and public transport for all road and public transport users – ensuring barriers to access including</li> </ul>	<ul style="list-style-type: none"> <li>New sustainable transport infrastructure.</li> <li>Sustainable transport links between deprived areas and employment/training opportunities</li> <li>Jobs created in transport including construction, supply chain and operations. Carbon reduction projects (No. of EV charge points, Low Emission Buses)</li> <li>Simplified fares and information including proportion of tickets purchased digitally and uptake of new MCard products for priority groups (e.g. under-25s).</li> </ul>	<ul style="list-style-type: none"> <li>Access to employment for deprived areas, by improving public transport, active travel and shared mobility options for people including those living in the 20% most deprived communities.</li> <li>Punctuality and reliability of bus and rail services.</li> <li>Public satisfaction with public transport.</li> <li>Satisfaction with transport information sources.</li> <li>Satisfaction with affordability of public transport.</li> <li>Mode share moving from car use to public transport, active travel and shared mobility with increased use of public transport and walking and cycling.</li> <li><del>Public satisfaction with bus and rail services in the region.</del></li> <li>Satisfaction with our transport infrastructure.</li> <li><del>Improve public transport and active travel options</del></li> </ul>

	<p>high quality, sustainable transport interventions, accompanied by robust behaviour change programmes in order to reach our full potential, reduce the reliance on private car use and contribute to becoming a net zero carbon region by 2038. <del>Bus patronage is in decline and cycling and walking have relatively low mode share — investment in sustainable transport is required to reach our full potential, reduce the reliance on private car use and contribute to becoming a net zero carbon region by 2038.</del></p> <ul style="list-style-type: none"> <li>▪ <b>Covid-19 has changed travel habits</b>, and the ticketing range needs to evolve to meet new demands. Moving forwards, there is a need to ensure that the necessary building blocks are in place to facilitate <b>increase integration, efficiency and affordability of our sustainable transport system including</b> the further modernisation and evolution of the public transport ticketing range <b>in order to respond to changing travel patterns and demand..</b></li> </ul>	<p>sustainable travel choices from day one.</p> <ul style="list-style-type: none"> <li>▪ <b>Make travel by public transport and active travel, including bus, an effective, accountable and affordable offer including</b> enhancements in ticketing and information to contribute directly to delivering a 21<sup>st</sup> Century transport system which is affordable, simple, integrated and accessible for people to travel anywhere by public transport. Passenger growth on bus and rail and future transport networks and enhanced customer satisfaction with public transport.</li> </ul>	<p>mobility, and connectivity are removed for our most disadvantaged groups because of poor transport links and/or quality of travel infrastructure, ensuring infrastructure development is compliant with accessible design standards.</p> <ul style="list-style-type: none"> <li>▪ <b>Policy measures and behaviour change programmes supported by and supporting infrastructure improvements.</b></li> <li>▪ Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Policy measures and behaviour change programmes supported by infrastructure improvements.</b></li> </ul>	<p><del>for people including those living in the 20% most deprived communities.</del></p> <ul style="list-style-type: none"> <li>▪ <del>Reduce car trips per year.</del></li> <li>▪ <del>Reduce CO2 emissions from car travel.</del></li> <li>▪ <del>Increase use of public transport and walking and cycling</del></li> <li>▪ <del>Generate jobs and connect people to housing and employment.</del></li> <li>▪ <b>Supporting new housing and employment development through sustainable transport options.</b></li> <li>▪ <b>Greater access to and use of public transport , active travel and shared mobility options by all, in particular by people of protected characteristics.</b></li> </ul>
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## Investment Priority 6 – Culture, Creative Industries, Sport and Physical Activity Creative Industries, Culture, Heritage and Sport

### KEY DRIVERS – ADDRESSING INEQUALITIES AND CONTRIBUTING TO A ZERO CARBON ENVIRONMENT.

The Combined Authority recognises the vital role of the creative industries, culture, heritage, sport and physical activity in West Yorkshire, and their contribution to ambitions for reducing inequalities and improving quality of life. Our aim is to make the most of the region's distinctive natural and cultural assets, enhancing pride and wellbeing and developing the local visitor economy.

West Yorkshire is blessed with world-class culture, heritage and sport assets: we are leaders in sculpture and contemporary art, with a thriving and fiercely independent music sector, a rich poetic and literary tradition, internationally significant theatre, dance and opera companies, major music and literature festivals, cutting-edge hubs for the games, screen and events industries, and a pioneering creative health sector, all served by an eco-system of innovative SMEs and freelancers. ~~The cultural and sporting assets of West Yorkshire stand out, from a rich heritage in textiles and world class sculpture to a more modern music, gaming and production chain of industries. We also boast heritage and modern cultural assets, both rural and urban, which have together contributed to a growing and confident economy with some recent landmark moments, including the arrival of Channel 4 and the opening (or revitalisation) of World class creative assets (such as the Piece Hall in Halifax), and the designation of Bradford as the UK City of Culture 2025.~~ Our colleges and universities provide national specialisms in creative skills and talent development, driving excellence in arts, humanities and sports science.

Channel 4 have relocated to Leeds and are already having an impact on the local production and talent ecosystem. Bradford have been crowned the UK's new City of Culture 2025, preceded by major cultural events across the region, including Leeds 2023 and Kirklees Year of Music 23, with years of culture in Wakefield and Calderdale in 2024.

The Piece Hall in Halifax has demonstrated the role of culture and heritage in creating vibrancy and passion in our places. We anticipate more major capital and regeneration projects in the region, including the forthcoming Bradford Live, British Library North and National Poetry Centre.

**Culture, heritage and sport have huge potential as levers to level up West Yorkshire.** They can create jobs and growth, and attract investment. They can inspire us to succeed. They can be the medicine that improves our mental and physical wellbeing.

~~Sport and culture enhances people's lives. It brings together people from different cultures. It can help people feel included, confident and part of their community. We have many regional unique assets including sculpture and poetry which could be utilised more to improve access and participation.~~

The creative industries in West Yorkshire generated nearly £2bn GVA in 20-21, and employs around 50,000 people. For every job in the creative and culture sectors, a further 1.9 non-tradeable jobs are created.

~~Our cultural assets and forward thinking have reaped economic benefits, with 2,200 businesses and 25,000 jobs across West Yorkshire within the arts, culture and entertainment sector directly. The sector generated economic output (gross value added / GVA) of £835m in 2018.~~ The strength in creativity and culture has also manifested itself in wider place making: the region boasts world class events and local production supporting growth but equally has a quirkiness that creative industries provide.

In October 2022, the Combined Authority endorsed a Heritage and Sport Framework, which was developed following engagement with Local Authorities, communities, and the culture, creative industries, heritage and sport sector. ~~The vision is currently being reviewed and updated working with key partners and the culture and creative industries committee and this Investment Strategy is based on the current draft framework.~~

This activity sits within a wider context of significant Combined Authority investment into the cultural sector, including £25m into British Library North as part of the 2021 Devolution Deal, to provide cultural, creative, learning and community space, £1.36m investment from the Getting Building Fund to acquisition and remediate the iconic George Hotel in Huddersfield, £600k to refurbish Dewsbury Arcade, creating retail units for creative businesses, and forthcoming investment into the Langthwaite Grange industrial estate, to make new business space available for the creative industries, in the context of the CoSTAR Lab creating a centre of excellence for live virtual production.

**Contribution to health outcomes :** Creative Industries, Culture, Heritage, and Sport play a crucial role in promoting health and well-being at both individual and community levels. By fostering physical activity, providing outlets for self-expression, encouraging social connections, and promoting a sense of identity and purpose, these sectors can have a positive and lasting impact on health outcomes.

ALIGNMENT WITH WY Plan	HEADLINE CHALLENGES	OUTCOMES TO BE ACHIEVED	WYIS - PRIORITY AREAS FOR INVESTMENT	HOW WE WILL MEASURE SUCCESS	
				Outputs	Results
<p><b>Mission 2: A happy West Yorkshire – great places and healthy communities</b></p>	<ul style="list-style-type: none"> <li><del>Impact of Covid-19: The sector was hit hard by the impact of Covid-19, with closures, high rates of furlough, limited operating opportunities, and exclusion from some forms of Government support.</del></li> <li><b>Access to opportunities:</b> equity of access to cultural opportunities and activities is not shared by all communities. More needs to be done to unlock diversity across the sector, including those with protected characteristics and those who face socio-economic barriers to participation.</li> </ul> <p><b>Reducing the productivity gap:</b> West Yorkshire lags behind the UK average for productivity. However, the creative industries out-performs most sectors in terms of productivity, growth, R&amp;D investment and export. Supporting our creative industries sector can stimulate growth.</p>	<p><b>People:</b></p> <ul style="list-style-type: none"> <li>Everyone in West Yorkshire can enjoy culture, heritage and sport, and we will reduce barriers due to age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, sexual orientation, or socio-economic background.</li> <li>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</li> </ul>	<ul style="list-style-type: none"> <li>Support for the Mayor's Creative New Deal</li> <li>Years of Culture (including LEEDS 2023, Kirklees Year of Music 2023, CultureDale 2024, 'Our Year' - Wakefield District 2024, and Bradford UK City of Culture 2025).</li> <li><del>West Yorkshire Heritage Fund: delivery Continued d of British Library North and development of wider pipeline of heritage schemes to enhance further the vibrant heritage offer.</del></li> <li>Maximise Creative Business Potential: provide specialist support for creative and cultural industries, and the sport and heritage sector. Align wider business support offer to enable sector to access support <del>to recover from impact of Covid-19.</del></li> <li><del>Employment and Skills: embedding creative skills into wider curriculums, developing provision to support a</del></li> </ul>	<p><b>People</b></p> <ul style="list-style-type: none"> <li>The impact and reach of our investments across the region.</li> <li>The number of people engaging with culture, heritage and sport activity (including young people), and whether they reflect the diversity of our communities.</li> <li>Perceptions of our region's culture,</li> </ul>	<p><b>People</b></p> <ul style="list-style-type: none"> <li>Increase in number of people engaging with culture, heritage and sport activity (including young people and people from deprived communities), reflecting the diversity of our communities.</li> <li>Positive perceptions of our region's culture, heritage and sport offer.</li> </ul>

<ul style="list-style-type: none"> <li>▪ <b>Joined-up approach to the sector:</b> we need to strengthen collaboration with local cultural businesses and national agencies to support economic growth across the region.</li> </ul> <p><b>Business engagement:</b> some creative businesses find it difficult to see the applicability of more generic support and require more specialist input. We also recognise that freelancers and micro-businesses make up a large proportion of the creative industries workforce and that our interventions must address their needs.</p> <ul style="list-style-type: none"> <li>▪ <b>Health and Wellbeing:</b> We recognise the opportunity for creative health interventions to increase the health and wellbeing of the people of West Yorkshire, while supporting arts practitioners with portfolio careers.</li> </ul>	<p>participated in by all parts of our population.</p> <ul style="list-style-type: none"> <li>▪ People in West Yorkshire are proud of their culture, heritage and sport.</li> </ul> <p><del>People in West Yorkshire have the opportunity to access and experience sport and culture. This improved access will enhance the confidence of all our communities and improve everyone's wellbeing. Year of Culture activities (culminating in Bradford City of Culture 2025) are complimentary and collaborative, delivering region-wide impact and legacy, and positioning West Yorkshire as the North's leading cultural destination.</del></p> <p><b>Place:</b></p> <ul style="list-style-type: none"> <li>• People are proud of their communities.</li> <li>• People get involved in local culture, heritage and sport activity.</li> <li>• People enjoy engaging with their historic and rural environment.</li> <li>• We have a thriving cultural tourism sector.</li> <li>• National and international leaders in the creative industries invest in the region.</li> </ul> <p><b>Skills:</b></p> <ul style="list-style-type: none"> <li>• West Yorkshire people from all backgrounds have the skills, opportunities, connections and confidence to build a sustainable career in these sectors.</li> <li>• There is a development pathway into roles in these sectors.</li> <li>• More people have fair, well-paid work in these sectors.</li> <li>• People move to West Yorkshire to forge a career in these sectors.</li> <li>• Freelancers are networked, know where to find help and resources, and are confident about their futures in West Yorkshire.</li> </ul> <p><b>Business:</b></p> <ul style="list-style-type: none"> <li>• People in West Yorkshire are confident and supported to found and grow businesses in the creative industries, heritage, and sports sectors.</li> <li>• Creative industries, heritage, and sports sectors view West Yorkshire as a desirable place to locate.</li> </ul>	<p><del>skilled creative workforce offering young people in particular a route in economic recovery into high quality jobs, whether that be directly in the creative industries, sport and heritage or applying them to elsewhere in the economy.</del></p> <ul style="list-style-type: none"> <li>▪ Visitor and Citizen Experience: harnessing a vibrant West Yorkshire cultural offer to drive a confident COVID-19 recovery of our places-visitor economy - creating a strong regional identity promoted globally, regenerating our places and ensuring our citizens can access quality experiences which enhance their lives.</li> <li>• Creative Health: building regional capacity for Creative Health initiatives, to increase health and wellbeing through cultural engagement.</li> <li>• <del>Support for cultural sector workers: ensuring that the sector is inclusive, confident and offers a safe and secure working environment especially for those working at night.</del></li> <li>• <del>Support for project development costs as required to progress the Investment Priorities proposed above.</del></li> <li>• Employment and Skills: developing provision to support a skilled and inclusive workforce, offering young people in particular a route into high quality jobs, whether that be directly in the creative industries, sport and heritage sectors, or applying them to elsewhere in the economy.</li> <li>▪ Continued delivery of British Library North and development of wider pipeline of schemes to enhance further the vibrant heritage offer.</li> <li>▪ Support for project development costs as required to progress the Investment Priorities proposed above.</li> </ul>	<p>heritage and sport offer.</p> <ul style="list-style-type: none"> <li>▪ Whether engagement with culture, heritage and sport is improving our health and well-being.</li> </ul> <p><b>Place</b></p> <ul style="list-style-type: none"> <li>▪ The number of people engaging with heritage activities and locations across the region, and whether they reflect the diversity of our communities.</li> <li>▪ The number of volunteers in culture, heritage and sport.</li> <li>▪ The level of culture, heritage and sport tourism in the region.</li> </ul> <p><b>Skills</b></p> <ul style="list-style-type: none"> <li>• The number of people working in our creative industries, heritage and sport sectors, and whether they reflect the diversity of our communities.</li> <li>• The increase in the number of people with protected characteristics working in these sectors.</li> <li>• The number of HE graduates taking up work in these sectors.</li> <li>• The number of training places made available for freelancers in these sectors.</li> <li>• Perceptions of freelancers on the sustainability of careers in West Yorkshire</li> </ul> <p><b>Business</b></p> <ul style="list-style-type: none"> <li>• The level of inward investment into the region from the creative and sport sectors.</li> <li>• The increase in creative industries, heritage and sports sector business growth and sustainability (including start-ups and SMEs).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Engagement with culture, heritage and sport is improving our health and well-being</li> </ul> <p><b>Place</b></p> <p>More people, reflect the diversity of our communities, are engaging with heritage activities and locations across the region.</p> <p>Increase in volunteers in culture, heritage and sport.</p> <ul style="list-style-type: none"> <li>▪ Increase in culture, heritage and sport tourism in the region.</li> </ul> <p><b>Skills</b></p> <ul style="list-style-type: none"> <li>• Increase in the number of people working in our creative industries, heritage and sport sectors.</li> <li>• Increase in the number of people with protected characteristics working in these sectors.</li> <li>• Increase in HE graduates taking up work in these sectors.</li> <li>• Increase in the number of training places made available for freelancers in these sectors.</li> <li>• Improved perceptions of freelancers on the sustainability of careers in West Yorkshire</li> </ul> <p><b>Business</b></p> <ul style="list-style-type: none"> <li>• Increased inward investment into the region from</li> </ul>
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		<ul style="list-style-type: none"> <li>• Creative industries, heritage, and sports sectors in West Yorkshire nurture talent and create well-paid work.</li> <li>• 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.</li> </ul> <ul style="list-style-type: none"> <li><del>• Culture is embedded within all place-based work and place planning and is used to deliver higher quality, more connected and sustainable places.</del></li> <li><del>• Culture is recognised and developed for its role in supporting the visitor economy.</del></li> <li><del>• Cultural and creative businesses and their supply chains are developed and supported to maximise their potential.</del></li> <li><del>• There is an increase in employment in culture, sport and arts roles across the region.</del></li> </ul> <p><del>Cultural activity that promotes clean growth and sustainability is developed and promoted including active travel, walking and cycling alongside programmes that deliver key messages relating to climate change and sustainability.</del></p>		<ul style="list-style-type: none"> <li>• The level of creative exports from the region including products, services, production and tourism.</li> <li>• The increase in diverse leadership in the creative industries, heritage and sports sectors.</li> </ul> <ul style="list-style-type: none"> <li><del>• No. people engaging with creative, cultural and sporting activities</del></li> <li><del>• No. of people from protected characteristics engaging with creative, cultural and sporting activities</del></li> <li><del>• No. businesses supported</del></li> <li><del>• No. new businesses established</del></li> <li><del>• No. people accessing careers advice</del></li> <li><del>• No. people from deprived communities benefiting from support</del></li> <li><del>• No. people with protected characteristics benefiting from support</del></li> <li><del>• No. empty premises utilised</del></li> </ul> <p><del>No. schemes promoting access to improved health and wellbeing</del></p>	<p>the creative and sport sectors.</p> <ul style="list-style-type: none"> <li>• Increase in creative industries, heritage and sports sector business growth and sustainability (including start-ups and SMEs).</li> <li>• Increase in creative exports from the region including products, services, production and tourism.</li> <li>• Increase in diverse leadership in the creative industries, heritage and sports sectors.</li> </ul> <p><del>Increased employment in creative and cultural sectors</del>  <del>Increase in jobs created paying at Living Wage</del>  <del>Increase in business start-ups</del>  <del>Increased visitors to West Yorkshire</del>  <del>Enhanced diversity of the workforce</del>  <del>Enhanced participation in cultural activities particularly amongst deprived communities</del>  <del>Improved productivity</del>  <del>Carbon reduction</del>  <del>Health / wellbeing impacts?</del></p>
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## 6 Identifying projects and programmes

Partners across West Yorkshire have identified, designed and delivered key projects and programmes for many years. The Combined Authority's officers will work with partners to identify opportunities and projects with the highest potential contribution to the Combined Authority's targeted objectives and outcomes.

Programmes / schemes will start to be developed through an ongoing dialogue with the local businesses, third sector and public organisations.

The Combined Authority will ensure stakeholders are informed about the availability of funding and the WYIS objectives, to allow them to identify, develop and co-design project/programme opportunities from an early stage and apply for funding clearly aligned to our investment priorities, as set out below.

As previously stated, there is commitment to fund the most effective delivery to meet objectives, and this means that delivery options will be considered from an early stage. Ultimately, we will strive to progress projects that best meet our objectives.

Other avenues for potential schemes to access funding opportunities could be through either a commissioning process or through open calls with specified deadlines for submissions. Any commissioning or open calls will aim to address specific gaps to help the Combined Authority achieve its overall ambitions;

- The Combined Authority may call for projects to fill gaps within the pipeline and whereby an innovative solution is being sought. Focused Calls will allow for greater innovative approaches to come forward without specifying the outcome, unlike a commissioning process (see below) which is more prescriptive.
- Second, it may commission strategically important projects by specifying desired outcomes and either delivering a project itself or inviting organisations to deliver the outcomes through a commission or procurement. An example could be where we wish to ensure that skills and training opportunities are provided to a certain group most affected by the changes in the economy; we could identify a project directly or invite organisations to present how they would provide that training then select the provider with the best public value proposition.

# 7 Prioritising and assessing investments

## 7.1 The Assurance Framework

The Combined Authority's investment process is described within the **Assurance Framework**. The document outlines the steps necessary to secure investment and the arrangements in place to ensure that public money is managed effectively. It explains how the Combined Authority will identify, appraise, and evaluate schemes.

The Assurance Framework, as well as ensuring the necessary systems and processes are in place to manage funding effectively, ensures that necessary practices and standards are implemented to provide the Government, Combined Authority and local partners with assurance that decisions over funding (and the means by which these decisions are implemented) are proper, transparent and deliver value for money.

## 7.2 Key principles of the investment approach

The key principle is to create a transparent and efficient journey to funding. Only those deliverable projects, with the highest potential contribution to the deliver the Combined Authority's, **agreed in partnership with the five partner councils** investment priorities, will be supported.

The early stage "check and challenge" at the concept stage (Activity 1 of the Assurance Framework), will help to ensure schemes meet the investment priorities. Selection of projects must also be driven by those which support inclusive growth, climate emergency ambitions, drive social value, tackle market failure, maximise value for money and provide different kinds of return to the SIF.

The aim of the Gateway Strategic Assessment undertaken at Activity 1, is to ensure only the projects/programmes which best meet these priorities are further developed and allowed to progress to the next stage and eventually be funded.

Features and principles of the prioritisation methodology and criteria the Combined Authority will use is set out in more detail in **Appendix 3 and 4**.

The key features and principles are:

- **Evidence of contribution to the Investment Priorities** – the assessment will rank and grade the depth of intelligence presented relative to core priorities and the indicator framework.
- **Functional weighting of priorities** – a greater emphasis, at the concept stage, will be put on sequencing of projects that show clear evidence of their contribution, short term and longer term, to our recovery and climate priorities - such as those which will support the economic recovery.
- **Project logic map and logic chain** - robustness and clarity – this should clearly set out why the public sector should intervene.
- **Deliverability** – assessing readiness to deliver, as well as capacity to deliver (internally, externally, supply chain), and to deliver results quickly, and that risks have been considered and appropriate mitigations put in place.

- **Funder of last resort** – this will link to the applicant's logic map to why the public sector should intervene and that all other funding options have been exhausted.

Only schemes which meet the threshold will proceed to the next stage. into the Combined Authority's pipeline. Projects at this stage can be rejected or deferred. Projects that do not score highly enough will not progress but will receive formal feedback on their score. This feedback will include steps available to improve the score and the support the Combined Authority is willing to provide in taking those steps, if any to allow schemes to progress at pace, even when they are not fully developed, this may include setting a number conditions to allow a scheme to progress to the next stage. The Combined Authority does not expect any project to be submitted at the concept stage more than twice and reserves the right permanently to exclude a project.

Any projects that are subsequently resubmitted by the scheme sponsor, must make clear through the submission how previous comments have been addressed. Projects will be re-considered if it can be demonstrated that key variables/parameters have changed, at the discretion of the Combined Authority.

Combined Authority officers will manage schemes to progress through each of the assurance stages and will be solely responsible for drafting investment reports, based on information provided by the scheme sponsor and contributions by any internal and/or external consultants. This process requires applicants to make readily available all supporting materials to the application and to enable third party diligence where necessary.

The Combined Authority will also seek to be clear in advance about the resources it has available and the time likely to be required to progress a project through its approval process. It is vital for scheme sponsors to understand that on-going dialogue and information exchange with the Combined Authority, its consultants and appraisers will be necessary to reach the end of the diligence process, and that this process may require a significant commitment on the part of the sponsor.

**Please refer to Appendix 3 and 4 for further guidance on the early-stage economic case review.**

### 7.3 Funding Agreements - Conditions to Funding

At the point where funding is released, the Combined Authority will enter into a funding agreement with the promoter. Any funding conditions will be specified in the funding agreement and can include but not limited to:

- A funding cap.
- The promoter's Chief Internal Auditor to provide assurance and to certify all expenditure on an annual basis.
- Claw-back provision in place to ensure funding is only to be spent on the specified scheme and that any cost savings achieved on the completed scheme are returned.
- Where projects could trigger a return on investment, they may be subject to overage. A consistent overage mechanism will be applicable where projects receive support through either grant or loan support or on disposal of property or assets.

- The Combined Authority, as the accountable body, will determine when to release funding.
- The Combined Authority may arrange for local audit of schemes to detect any misuse of funds.
- All organisations that receive funding through the Combined Authority are contractually required to acknowledge this, and that of Government in all communications and marketing activity. This includes use of logos on relevant communications materials, inclusion of specified wording in press releases and development of stories and case studies that showcase the impact of schemes.

The Combined Authority will look to recover funding where there has been non-compliance, misrepresentation or under-performance. The Accountable Body arrangements in Appendix 2 set out how concerns are escalated, including taking a legal opinion on the likelihood of recovery.

**For the avoidance of doubt, no project is approved for delivery until legal documentation is entered into and complete.**

## 8 Monitoring and Evaluation

As detailed within the Assurance Framework, all schemes are monitored throughout their delivery stages (see Assurance Framework) and progression through the assurance process.

Programmes and schemes funded by the Combined Authority are required to have a monitoring and evaluation plan as part of business case development. These should be produced as part of activity 2 (SOC), refined throughout the business case development and finalised at the end of activity 4 (FBC). In addition, an monitoring plan (formerly benefits realisation plan) is also required as part of business case development.

The outputs from the evaluation and monitoring plans will be used to assess the effectiveness and impact of publicly funded investments and the extent to which schemes are contributing to the overall objectives of the Combined Authority.

An Evaluation Strategy has been adopted by the Combined Authority, which shapes the design and development of project level evaluation activity through its focus on “Logic Models” as the basis for Evaluation (“activity 7” of the Assurance Framework reporting), shaping the information we capture at project closure and introducing more consistency to the learning and insights that we synthesise and communicate. The Evaluation Strategy sets out how logic models should be developed. The Evaluation Strategy is locally owned, managed, and draws on local systems. It sets out the following principles:

- Evaluation planning is an integral part of developing the business case
- The focus of evaluation reflects the business case
- Evaluation efforts are proportional to the intervention’s scale and complexity
- Monitoring and evaluation data are consistent across policy areas
- Evaluation will be undertaken independently of delivery
- Evaluation is a learning process and a key component in policy development
- Evaluation data and findings are disseminated effectively

Building on the principle of proportionality, (i.e., that not everything will be evaluated to the same degree, depending on the scale of the investment and learning opportunities) the Evaluation Strategy also recommends that partnership working takes place to identify opportunities for thematic evaluations, which could be conducted across areas or centrally commissioned.

The monitoring and evaluation undertaken will support the Annual Review of the Investment Strategy and will help inform and shape activities to be supported moving forwards.

### Government Gateway Review

Each Mayoral Combined Authority Single Investment Fund is subject to a five yearly Gateway Review by Government to assess progress and decide on the next five-year tranche of funding. The purpose of the Gateway Review is to evaluate the impact of (locally appraised) interventions funded by each Investment Fund on local economic

growth, and the process by which these interventions were agreed and implemented.

Activity funded under the Local Growth Fund (for West Yorkshire Combined Authority this is the West Yorkshire Plus Transport Fund) and Devolution (Gainshare) is currently subject to a Government Gateway Review.

This government requirement on which future funding depends (£30,000,000 per year until 2034/35 and £38,000,000 per year respectively, amounting to £68,000,000 per year) is an important opportunity, aligned closely with our organisational ambition to build our evidence base, to develop learning and insight that informs future policy and practice.

Future Investment Strategies will take this learning forward in to its design to ensure it remains an effective and transparent tool for making investment decisions which will benefit the region.

## Appendix 1: SIF Resources

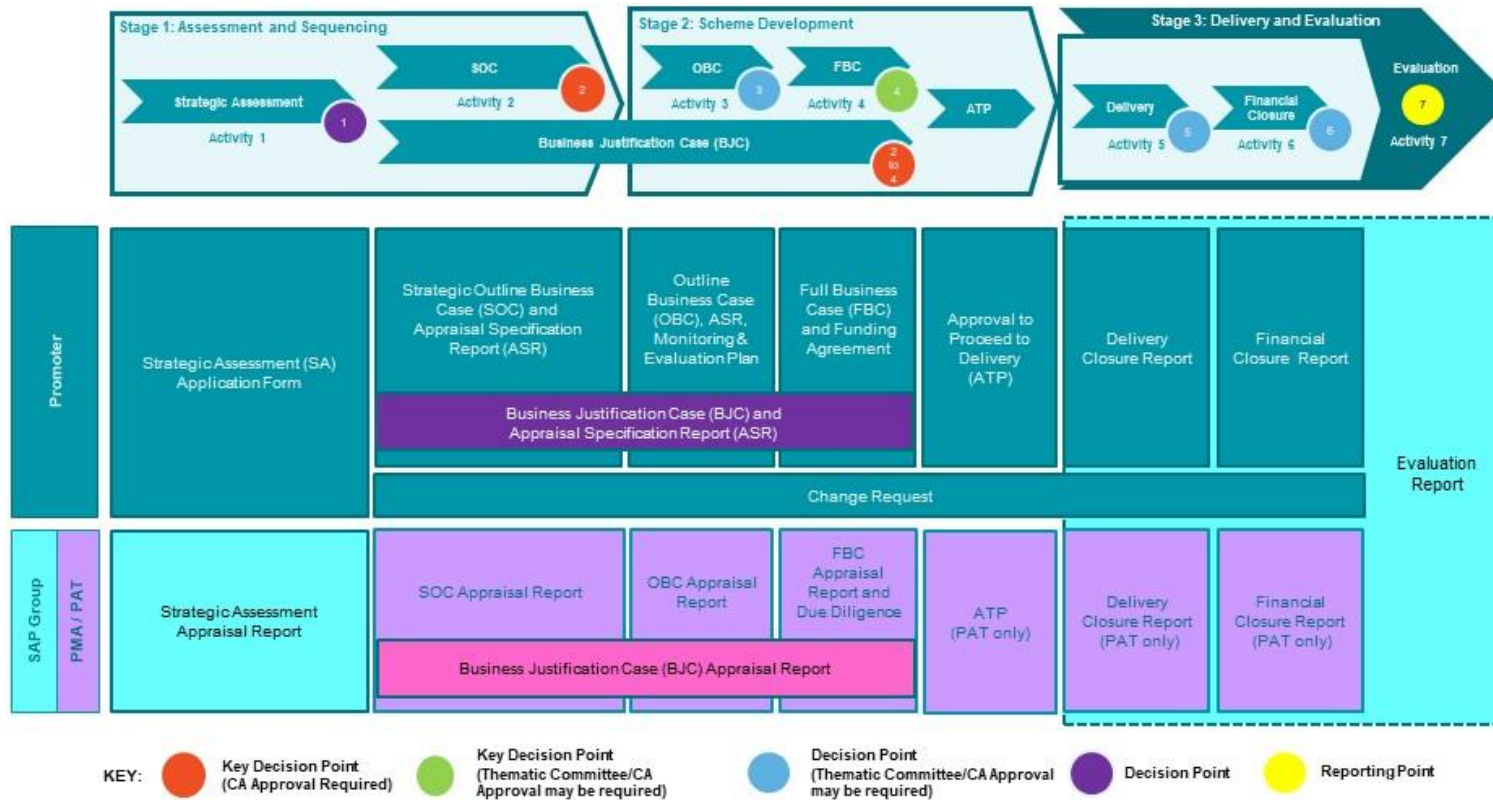
The design of the SIF recognises the different levels of funding flexibility which will need to be taken into consideration in terms of their usage. The funding included in the SIF is as follows:

- **Flexible Funds**
  - £38m per year for 30 years – gainshare (25% capital, 75% revenue)
  - funding available to the Combined Authority through its ability to raise money
  - Some 'unencumbered' capital receipts (such as proceeds from asset sales).
  
- **Ringfenced for a set purpose - but flexibility in deployment**
  - Brownfield Housing Fund £67m (5 year)
  - Adult Education Budget £42m 2021-22, thereafter £65m per annum
  - £3.2m to develop a pipeline of housing sites
  - £5m Social Housing Decarbonisation Fund (SHDF)
  - Highways/pothole monies (est. £30m)
  - Local Transport Plan (est. £13.1m)
  - Enterprise Zone receipts (est. £2.3m)
  - Intra-City Transport settlement (£7.4m)
  - City Deal Transport Fund £81.8m (4 years)
  - Some capital receipts (including repaid Growing Places Fund) (est. £21m).
  - Future Mayoral precept receipts
  - UK Shared Prosperity Fund (£83m)
  
- **Ringfenced – for a set purpose and projects are pre-determined.**
  - £317m to invest in public transport, cycling and walking through the Transforming Cities Fund, with local flexibility on delivery
  - £25m for development of a British Library North
  - £75,000 to support the West Yorkshire Local Digital Skills Partnership
  - Transport Fund gainshare (from 21/22 £30m for the next ten years, plus WY+TF Reserve (£38.3m plus annual Transport Levy contrib of est. £5.2m p.a).
  - £830m City Region Sustainable Transport Settlement (CRSTS) funding (over five years from 2022/23 to 2026/27 with £13.9m development revenue funding for the first three years)
  - £24.5m Zero Emissions Bus Regional Areas (ZEBRA)
  - £35m (to date) of Active Travel funding

Future external capital and revenue funding is expected to be added over time.

## Appendix 2: West Yorkshire Assurance Framework

# Assurance Process



Please Note:

The Assurance Process is flexible and not all programmes and projects need to go through all Decision Points and approvals can be delegated to the thematic committees or Chief Executive



## Appendix 3: Prioritisation framework

Once partners are ready to submit a funding application, assessment and prioritisation will be undertaken using a single, simple methodology. The aim of this methodology is to compare projects' contribution to our objectives, and how well they will contribute to the Investment Priorities as described in section 5, identifying the most compelling and robust schemes.

The process is as described in the Assurance Framework. Detailed guidance for completing a funding application is available, along with the application form itself and other supporting documentation. [Access is here](#)

The criteria to be used to undertake the assessment at Activity Stage 1 of the Assurance Process will be:

- **Market failure – this is a pass / fail gateway criterion**
- **Political engagement – this is also a pass / fail gateway criterion**
- **Strategic fit** - greater weight will be given to schemes that ~~have a greater impact over a wider range of~~ demonstrate the greatest contribution to the investment priorities as described in section 5.
- ~~Monetised outputs and value for money – leverage and additionality relative sum of external funding levered and not displaced~~ **Economic efficiency and benefits-** Schemes that deliver at scale practical outputs and outcomes linked to the WYIS priorities will be favoured.
- **Deliverability/risk** – deliverability / risk score is used to prioritise projects that have a clear and credible pathway to delivery, face lower risks and have better mitigations in place.
- **Sequencing** which fully demonstrates the contribution to the most urgent priorities.
- **Addressing the Climate Emergency** – applicants must set out the compatibility of their project with a net zero future for West Yorkshire.
- **Contribution to Inclusive Growth and Equity and Diversity ambitions** – projects must proactively contribute to these agendas. ~~wherever feasible~~.

Each criterion is given a score, which is weighted in the following proportions:

- **Strategic fit** – out of 20 points
- **Economic efficiency and benefits** – out of 15 points
- **Deliverability, risks and their mitigation** – out of 15 points
- **Sequencing** - which fully demonstrates the contribution to the most urgent priorities -- out of 10 points
- **Contribution to Climate Emergency commitment** -- out of 20 points
- **Contribution to Inclusive Growth ambition** – out of 10 points

- **Contribution to Equity and Diversity ambition** - out of 10 points.

Therefore, each project is able to achieve a maximum score of 100 points. The higher the score achieved, the higher the priority assigned to the project.

The Gateway Assessment Matrix at **Appendix 3** – sets out the criteria and evidence requirement.

Schemes which make the strongest contribution to our inclusive growth objectives will be prioritised, through maximising lasting opportunities for local people and engaging sections of our community that are currently less likely to benefit.

## Gateway Assessment and Prioritisation process - Activity 1 of the Assurance Framework

As described in the Assurance Framework, programmes / schemes will be assessed on a case-by-case basis by the Strategic Assessment Prioritisation Group (SAP) to determine if they are eligible to proceed using the criteria described above, through an early-stage gateway check and challenge review.

If programmes / schemes are eligible, they will be awarded ‘*approved development status*’ (Decision Point 1) and will then progress to Strategic Outline Case (SOC) as part of the assurance process (Activity 2).

The total prioritisation score for the project is the sum of the weighted scores of the different criteria out of 100. The higher the prioritisation score, the higher priority the project is for investment via SIF.

In summary, schemes will score more highly if they:

- Demonstrate a higher level of strategic fit to the West Yorkshire Investment Priorities and demonstrate a strong and timely impact in terms of the outputs and outcomes specified in the investment strategy.
- Contribute to the key cross-cutting themes of inclusive growth, tackling the climate emergency and supporting equity and diversity.
- Demonstrate deliverability and lower levels of project risk at the initial stage.

Programmes / schemes at this stage will be provided with feedback and can be rejected or deferred until further supporting information is provided. This is carried out by assessing strategic fit against the WYIS. The SAP Group will recommend a Strategic Assessment (SA) decision notification for approval by the Chief Executive (or by an officer under sub-delegated authority from the Chief Executive) (Decision Point 1).

## Appendix 4: Gateway Assessment Matrix

Criteria	Weight	Assessment method	Evidence requirement
<p>65</p> <p><del>Market failure / funder of last resort – evidence to show that public funding is required and that other funding options have been exhausted.</del> a clear case to show that public investment is justified in order to address market failure <b>or by exception</b> where there is an opportunity to explore areas, where a market failure may not be evident, but where a return on investment can be generated and/or where innovative investments lead to an opportunity to benefit the region.</p>	N/A	<b>Pass / fail. Proposals that do not meet this criterion do not proceed any further.</b>	<p>Submission demonstrates that there is clear market failure (i.e. proposal provides a suitable focus for public funding) and that other funding sources have been explored.</p> <p>Investment will be made in projects that:</p> <ul style="list-style-type: none"> <li>• Demonstrate a clear strategic case for public investment, for example to address market failure, or provide the enabling infrastructure for growth; and / or:</li> <li>• Represent an investment opportunity for a direct financial return to the Combined Authority on any SIF investment. This is subject to the funding principles set out in section 3.2.</li> <li>• Market failure is defined as a situation where the operation of the market is not expected to provide an economically or socially beneficial outcome to the desired extent, or within an optimal timeframe. Often this occurs when the private sector cannot capture all of the benefits of investment (i.e. when many of the benefits are social / economic rather than financial return).</li> <li>• Where the market is unable to provide the full cost of capital, we will invest in the infrastructure that enables and unlocks the growth we require eg in transport, digital, social and other infrastructure. In other cases, such as investment in residential or commercial property, market failure is very much dependent on the specifics of a given investment.</li> <li>• We may also invest in public goods and public value, where the wider benefits to the people and places of the region are the primary return on investment.</li> </ul>
<p><b>Political Engagement</b> – demonstrate that there has been political engagement around your proposal.</p>	N/A	<b>Pass / fail. Proposals that do not meet this criterion do not proceed any further.</b>	<ul style="list-style-type: none"> <li>• Clear demonstration that the project or proposal and the need which it is addressing have been discussed or debated as part of formal, documented proceedings of a Combined Authority or Local Authority committee, sub-committee or standing panel.</li> <li>• Or show that it has been discussed through other local consultative forums appropriate to the CA governance structure and the governance structure of the constituent local authorities which make up the Combined Authority.</li> </ul>

Criteria	Weight	Assessment method	Evidence requirement
<p><b>Strategic fit</b> – how the project supports the strategic investment priorities of the West Yorkshire Investment Strategy (WYIS) and contributes to delivery of the priority outcomes. For each 5-year period of the WYIS the key outcomes and indicators will be set – factoring in sequencing of investments (priorities and outcomes derived from <b>WY Plan</b>).</p>	20	<p>Project scored in terms of its impact / contribution to WYIS priorities.</p> <p>4 – very high impact 3 – 2 – 1 – very low impact</p> <p>This is a qualitative assessment.</p>	<ul style="list-style-type: none"> <li>• Determining strategic fit is about the extent to which the intervention/project best addresses the strategic investment priorities of the WYIS. The application must indicate which priorities <b>(can be one or more)</b> it will contribute to and how it will contribute to them.</li> <li>• A <b>logic model</b> showing how the project activities and outputs contribute to strategic priorities and outcomes of the WYIS is required.</li> <li>• Section 5 sets out our strategic investment priorities. The submission should be clear how the strategic investment priorities will be addressed. <i>Projects which do not credibly demonstrate that they will address one or more of the strategic investment priorities will be rejected.</i></li> <li>• Rigour of the logic model should be demonstrated with reference to evaluation / success of past projects. It should be as specific as possible and cite facts rather than rely on generalities.</li> <li>• The application must also demonstrate how it will align with and complement existing interventions.</li> </ul>
<p><b>Economic efficiency and benefits</b> – prioritisation of projects that deliver at scale practical outputs and <b>benefits-outcomes linked to key-outcomes set out in the WYIS priorities.</b></p>	15	<p>Assessed on a four-point scale relative to an agreed benchmark:</p> <p>4 – Strong and compelling evidence of scheme benefits 3 – 2 – 1 – No evidence of scheme benefits.</p>	<ul style="list-style-type: none"> <li>• Summary of the type and quantity of short, medium, and long-term outputs, outcomes/ impacts that the project will deliver based on the project's logic model.</li> <li>• Calculation method / basis for the outputs and outcomes to demonstrate that they are achievable.</li> <li>• Estimated total project cost, funding requested and sources / value of any additional funding.</li> <li>• Financial profile template.</li> <li>• Assessment of the likely range of unit costs associated with the anticipated outputs.</li> <li>• As part of the submission, the project sponsor will describe the amount of leverage – schemes which achieve greater leverage, and so amplify the impact of the CA's investment will be prioritised.</li> </ul>

Criteria	Weight	Assessment method	Evidence requirement
<p><b>Deliverability / risk</b> – prioritise projects that demonstrate that they are deliverable, are lower risk and have mitigation in place.</p>	15	<p>Assessed on a four-point scale reflecting degree of risk associated with the project:</p> <p>4 – very low risk 3 – 2 – 1 – high risk</p> <p>This is a qualitative assessment.</p>	<ul style="list-style-type: none"> <li>• Project plan; risk register; resources available.</li> <li>• Assessment will be undertaken to assess whether a project is realistically deliverable within the proposed timeframe. Track record and past experience may form part of the evidence checks.</li> <li>• The assessment includes checking that mitigating steps are planned and set out where identified. This is particularly important in relation to the proposed project management / delivery team and to check it is adequately resourced.</li> <li>• Consideration should be given to how deliverability failure could manifest itself and what would the implications be? (in terms of time and cost).</li> </ul>
<p><b>Sequencing</b> – demonstrates contribution to most urgent priorities.</p> <p>67</p>	10	<p>Impact of proposal on urgent priorities – addressing cost of living / doing business crisis and tackling climate emergency:</p> <p>4 – very high impact 3 – 2 – 1 – very low impact</p> <p>This is a qualitative assessment.</p>	<p>The applicant should set out how their proposed scheme will contribute to the most urgent priorities. Currently, these are the cost of living / cost of doing business crisis and tackling the climate emergency.</p>

Criteria	Weight	Assessment method	Evidence requirement								
<b>Climate emergency –</b> demonstrates compatibility with West Yorkshire’s Carbon Emissions Reduction Pathways (CERP)	20	Compatibility with CERP: 4 -Fully compatible – project may be prioritised and/or further strengthened to maximise benefits at design stage 3- Conditional – opportunities to enhance positive outcomes/mitigate negative outcomes to be considered at design phase 2-At risk - carbon impacts to be looked at in more detail (e.g. as part of later stages in the appraisal process); requirement to consider mitigation of negative outcomes as part of design stage 1-Incompatible with net zero commitment  The assessment will be carried out with the Combined Authority’s carbon impact assessment tool.	<ul style="list-style-type: none"> <li>West Yorkshire Combined Authority has developed a carbon impact assessment tool to ensure decision making on investments takes into consideration the <b>carbon impacts of those investments</b> and their <b>alignment to West Yorkshire’s net-zero target</b></li> <li>The tool is used to examine the compatibility of different types of scheme investments with West Yorkshire’s Carbon Emissions Reduction Pathways (CERP) and is intended to make the process more systematic and consistent.</li> <li>The tool involves a process of self-assessment by the project promoter, based on a review of GHG sources associated with the scheme type and completion of a strategic assessment checklist.</li> <li>The results of the process provide the basis for the project’s score against this criterion.</li> </ul>								
<b>Inclusive Growth –</b> demonstrates that a proactive approach to inclusion is integral to project.	10	Impact of proposal on fostering inclusive growth: 4 – very high impact 3 – 2 – 1 – very low impact  This is a structured qualitative assessment.	Inclusive growth element cannot be a bolt-on and project must demonstrate an integrated, proactive and targeted approach to engaging with and bringing benefit to disadvantaged groups (outreach, tailored support etc).  In support of this assessment evidence will be required of how the project will specifically address the following inclusive growth themes <table border="1" data-bbox="1169 1091 1601 1406"> <tr><td>Health</td></tr> <tr><td>Jobs</td></tr> <tr><td>Mobility</td></tr> <tr><td>Income</td></tr> <tr><td>Fuel poverty</td></tr> <tr><td>Housing</td></tr> <tr><td>Education</td></tr> <tr><td>Crime</td></tr> </table>	Health	Jobs	Mobility	Income	Fuel poverty	Housing	Education	Crime
Health											
Jobs											
Mobility											
Income											
Fuel poverty											
Housing											
Education											
Crime											

Criteria	Weight	Assessment method	Evidence requirement
<b>Tackling Inequalities and supporting Diversity</b> – demonstrates that project proactively addresses the needs of under-represented groups.	10	Impact of proposal on tackling inequalities and supporting diversity: 4 – very high impact 3 – 2 – 1 – very low impact  This is a structured qualitative assessment	<ul style="list-style-type: none"> <li>Wherever possible schemes should be shaped around the needs of under-represented groups as a means of directly tackling social and economic disadvantage.</li> <li>The application must demonstrate that the impact of any proposal has been considered in relation to groups of people with Protected Characteristics. <b>Projects which demonstrate a positive impact will receive a higher score.</b></li> <li>Promoters <del>are encouraged to provide an outline EIA alongside their Strategic Assessment application, although this is not a formal requirement at this stage</del> <b>Must provide a Stage 1 equality impact assessment in support of their application using the Combined Authority's template.</b></li> </ul>
<b>Total</b>	<b>100</b>		

~~Any project scoring less than 60 overall would not be accepted onto the pipeline; those scoring 60 or more would progress and would be ranked according to their overall score.~~

6 **Only schemes scoring 60 or more overall will be awarded approved development status.**

It should be noted that acceptance onto the pipeline does not guarantee funding, this will be determined by the financial strategy and the resources available.

## Appendix 5: Investments made to date through the West Yorkshire Investment Strategy

Project Name	Start Date	Primary Funding Programme	Funding Awarded
Active Travel - Public Rights of Way - Bradford	02/09/2022	City Region Sustainable Transport Settlement	£178,020.00
Active Travel - Public Rights of Way - Calderdale	02/09/2022	City Region Sustainable Transport Settlement	£239,940.00
Active Travel - Public Rights of Way - Kirklees	02/09/2022	City Region Sustainable Transport Settlement	£195,220.00
Active Travel - Public Rights of Way - Leeds	02/09/2022	City Region Sustainable Transport Settlement	£152,220.00
Active Travel - Public Rights of Way - Wakefield	02/09/2022	City Region Sustainable Transport Settlement	£94,600.00
Active Travel Tranche 3 - A660 Otley Road	04/05/2022	Active Travel	£470,000.00
Active Travel Tranche 3 - A660 Otley Road (Combined Authority)	04/05/2022	Active Travel	£139,430.00
Active Travel Tranche 3 - ATN - Bradford	04/05/2022	Active Travel	£525,000.00
Active Travel Tranche 3 - ATN - Bradford (Combined Authority)	04/05/2022	Active Travel	£15,300.00
Active Travel Tranche 3 - ATN - Calderdale	04/05/2022	Active Travel	£475,000.00
Active Travel Tranche 3 - ATN - Calderdale (Combined Authority)	04/05/2022	Active Travel	£13,840.00
Active Travel Tranche 3 - Darley Street (Bradford City Centre)	04/05/2022	Active Travel	£600,000.00
Active Travel Tranche 3 - Darley Street (Bradford City Centre) (Combined Authority)	04/05/2022	Active Travel	£17,480.00
Active Travel Tranche 3 - Programme (Combined Authority)	04/05/2022	Active Travel	£196,250.00
Active Travel Tranche 3 - School Streets - Bradford	04/05/2022	Active Travel	£70,000.00
Active Travel Tranche 3 - School Streets - Calderdale	04/05/2022	Active Travel	£70,000.00
Active Travel Tranche 3 - School Streets - Combined Authority	01/04/2021	Active Travel	£10,200.00
Active Travel Tranche 3 - School Streets - Kirklees	04/05/2022	Active Travel	£70,000.00
Active Travel Tranche 3 - School Streets - Leeds	01/04/2021	Active Travel	£70,000.00
Active Travel Tranche 3 - School Streets - Wakefield	01/04/2021	Active Travel	£70,000.00
Active Travel Tranche 4 - Programme (Combined Authority)	10/03/2023	Active Travel	£0.00
BCPC - A61(N) Scott Hall Road Bus Lane (83)	28/09/2022	(blank)	£0.00
BCPC - A62 - A644 Bus Enhancements (35)	29/09/2022	City Region Sustainable Transport Settlement	£150,000.00
BCPC - Beckett Street (36)	28/09/2022	City Region Sustainable Transport Settlement	£0.00
BCPC - Bradford Bus Hotspots (87)	29/09/2022	City Region Sustainable Transport Settlement	£0.00
BCPC - Calderdale Bus Hotspots and Enforcement (33)	28/09/2022	City Region Sustainable Transport Settlement	£0.00
BCPC - Connecting North East Calderdale (34)	28/09/2022	City Region Sustainable Transport Settlement	£1,560,000.00
BCPC - Elland Road - Churwell Hill (88)	29/09/2022	City Region Sustainable Transport Settlement	£0.00
BCPC - Heath Common to Knottingley Bus Priority Package (39)	28/09/2022	City Region Sustainable Transport Settlement	£100,000.00
BCPC - Horbury and Ossett to Wakefield BPP (40)	28/09/2022	City Region Sustainable Transport Settlement	£90,000.00
BCPC - Kings Road Sustainable Transport Corridor (82)	29/09/2022	City Region Sustainable Transport Settlement	£250,000.00
BCPC - LCC Bus Priority & Active Travel Bus Priority (37a)	28/09/2022	City Region Sustainable Transport Settlement	£1,013,000.00
BCPC - LCC Bus Priority Active Travel Cycle Loops (37b)	16/11/2022	City Region Sustainable Transport Settlement	£100,000.00
BCPC - North Wakefield Bus Priority Package (86)	28/09/2022	City Region Sustainable Transport Settlement	£75,000.00
BCPC - South Wakefield Bus Priority Package (85)	28/09/2022	City Region Sustainable Transport Settlement	£50,000.00
BCPC - Thirsk Row - King Street Bus Gate (89)	29/09/2022	City Region Sustainable Transport Settlement	£1,500,000.00
BCPC - Wakefield Road Sustainable Transport Corridor (32)	29/09/2022	City Region Sustainable Transport Settlement	£358,128.00
BCPC - Woodhouse Lane Gateway (84)	28/09/2022	City Region Sustainable Transport Settlement	£100,000.00
Better Homes Hub (BHH)	05/01/2023	Gainshare Revenue	£718,293.00
Better Neighbourhoods	21/12/2022	Gainshare Revenue	£2,060,000.00
Better Neighbourhoods - Bradford	19/05/2023	Gainshare Revenue	£397,324.00
Better Neighbourhoods - Kirklees	19/05/2023	Gainshare Revenue	£310,950.00
Better Places - A639 Park Road - Pontefract (38)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Better Places - A660 Bus Priority and Cycle Corridor (50)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Better Places - Dalton Deighton Active Travel Route (48)	06/12/2022	City Region Sustainable Transport Settlement	£150,000.00



Project Name	Start Date	Primary Funding Programme	Funding Awarded
BHF Armley Tower Works	31/10/2022	Brownfield Housing Fund	£932,775.00
BHF Bailiff Bridge	09/06/2022	Brownfield Housing Fund	£0.00
BHF Brownfield Housing Fund - PAN Charges	13/04/2022	Brownfield Housing Fund	£0.00
BHF Canal 30	04/10/2022	Brownfield Housing Fund	£1,600,000.00
BHF Crag Road Phases 2 and 3 - Bradford	25/10/2021	Brownfield Housing Fund	£0.00
BHF Crosland (West Hudds Gateway)	28/01/2022	Brownfield Housing Fund	£0.00
BHF Galem House	04/10/2022	Brownfield Housing Fund	£1,200,000.00
BHF Kirkgate Gateway - Wakefield	28/01/2022	Brownfield Housing Fund	£0.00
BHF Leeds East (Copperfields)	01/04/2022	Brownfield Housing Fund	£100,000.00
BHF Leeds Kirkstall Road Residential Development	16/06/2022	Brownfield Housing Fund	£0.00
BHF Liversedge (RM Grylls)	28/01/2022	Brownfield Housing Fund	£0.00
BHF North Halifax (Transforming North Halifax)	28/01/2022	Brownfield Housing Fund	£0.00
BHF Railway Street	09/08/2022	Brownfield Housing Fund	£1,500,000.00
BHF St Cecilia Street	29/09/2022	Brownfield Housing Fund	£0.00
Bradford Literary Festival	24/03/2022	Gainshare Revenue	£250,000.00
British Library North – Programme Management	10/05/2022	No Programme	£350,000.00
Building on AdVenture	03/04/2023	Gainshare Revenue	£5,000,000.00
Bus - UTM and Passenger Information Interface	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Bus Delivery - Bus Delivery Monitoring and Evaluation (Combined Authority)	22/04/2022	Leeds Public Transport Investment Fund (LPTIP)	£155,755.00
Bus Delivery - Transport Hubs and Connecting Communities - Phase 3	12/04/2021	Leeds Public Transport Investment Fund (LPTIP)	£0.00
Bus Franchising Assessment	25/10/2021	Gainshare Revenue	£1,000,000.00
Bus Service Improvement Plan	01/04/2022	Funding Programmes	£0.00
Bus Station Solar (BSS)	20/12/2022	Gainshare Revenue	£476,203.00
Bus Stop Improvements (3a)	13/03/2023	Levelling Up Fund	£0.00
Business Productivity Programme	01/04/2021	Gainshare Revenue	£4,500,000.00
Business Sustainability Package	04/11/2022	Gainshare Revenue	£10,596,934.00
Business to Business Sales - Travel Plan Network Team	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Business to Customer Sales and Marketing - Behaviour Change	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Business West Yorkshire	11/07/2022	Gainshare Revenue	£0.00
City Region Sustainable Transport Settlement	01/04/2022	Funding Programmes	£0.00
City Region Sustainable Transport Settlement - PAN charges	24/08/2022	City Region Sustainable Transport Settlement	£148,038.00
City Region Sustainable Transport Settlement Capacity Fund	03/03/2022	No Programme	£5,756,411.00
CityConnect Phase 3 Cooper Bridge (Combined Authority)	14/02/2022	Transport Fund	£0.00
Clean Bus Technology Fund	07/07/2021	Funding Programmes	£0.00
Combined Services and Assets Database (CoSa) Replacement	21/07/2022	City Region Sustainable Transport Settlement	£50,000.00
Corridor Improvement Programme - Leeds - A660 Headingley Hills (Combined Authority)	01/05/2021	Transport Fund	£0.00
CRSTS - Inflation	10/03/2023	City Region Sustainable Transport Settlement	£0.00
CRSTS - Risk and Contingency	10/03/2023	City Region Sustainable Transport Settlement	£0.00
CRSTS - TCF Programme	07/10/2022	City Region Sustainable Transport Settlement	£90,050,597.00
CRSTS Behaviour Change	24/03/2022	City Region Sustainable Transport Settlement	£10,541,265.00
CRSTS Communications	07/10/2022	City Region Sustainable Transport Settlement	£7,400,000.00
CRSTS Jacobs - Highways SOC Costs	28/09/2022	City Region Sustainable Transport Settlement	£100,000.00
CRSTS Monitoring and Evaluation	07/10/2022	City Region Sustainable Transport Settlement	£5,011,395.00
CRSTS Programme Management	11/08/2022	City Region Sustainable Transport Settlement	£6,312,500.00
Culturedale Calderdales Year of Culture 2024	03/04/2023	Gainshare Revenue	£0.00
Cycle City Ambition Grant	07/07/2021	Funding Programmes	£0.00
Cycle Safety	07/07/2021	Funding Programmes	£0.00

Project Name	Start Date	Primary Funding Programme	Funding Awarded
Digital Enterprise	01/07/2023	UK Shared Prosperity Fund (UKSPF)	£0.00
Emergency Active Travel Fund	12/04/2022	Active Travel	£2,513,000.00
Employment West Yorkshire	15/07/2022	Gainshare Revenue	£12,000,000.00
Energy Price Crisis Emergency Business Grants Programme (EPC)	21/10/2022	Gainshare Revenue	£1,100,000.00
Enhanced Safer Travel Partnership with West Yorkshire Police	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Fair Work Charter	01/04/2021	Gainshare Revenue	£600,000.00
GBF Enterprise Zones Expansions - Wakefield Langthwaite	27/05/2021	Getting Building Fund	£155,000.00
GBF Getting Building Fund - PAN charges	13/04/2022	Getting Building Fund	£971,000.00
GBF Leeds Liverpool Canal Towpath and Cycleway (Combined Authority)	30/04/2021	Getting Building Fund	£5,000.00
GBF Programme Development (over-programming)	15/04/2021	Getting Building Fund	£455,000.00
GBF Project Development	15/04/2021	Getting Building Fund	£0.00
GPF West Yorkshire Business Accelerator LP	10/06/2021	Growing Places Fund	£0.00
GR – Gainshare Capacity	08/03/2022	Gainshare Revenue	£11,400,000.00
Green Jobs Taskforce and Gateway	07/07/2021	Gainshare Revenue	£500,000.00
Greener Together	08/03/2022	Gainshare Revenue	£306,604.00
Growing Places Fund	12/10/2021	Funding Programmes	£0.00
Highways Asset Management - Bradford	11/07/2022	City Region Sustainable Transport Settlement	£13,124,000.00
Highways Asset Management - Calderdale	11/07/2022	City Region Sustainable Transport Settlement	£8,350,000.00
Highways Asset Management - Kirklees	11/07/2022	City Region Sustainable Transport Settlement	£12,938,000.00
Highways Asset Management - Leeds	11/07/2022	City Region Sustainable Transport Settlement	£18,456,000.00
Highways Asset Management - Wakefield	11/07/2022	City Region Sustainable Transport Settlement	£9,032,000.00
Highways Asset Management Documentation Library	11/11/2022	City Region Sustainable Transport Settlement	£0.00
Housing Pipeline Revenue Fund	27/04/2021	No Programme	£0.00
Inclusivity Champion and Inclusive Growth Pipeline	20/01/2022	Gainshare Revenue	£175,000.00
Integration Package - Car Club Network Electrification (44)	06/12/2022	City Region Sustainable Transport Settlement	£50,000.00
Integration Package - Demand Responsive Travel (DRT) (44)	24/11/2022	City Region Sustainable Transport Settlement	£0.00
Integration Package - Integrated Information (44)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Integration Package - Integrated Ticketing and Payment (44)	24/11/2022	City Region Sustainable Transport Settlement	£0.00
Internal Capacity - Bus Priority and Safety	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Internal Capacity - Clear and Simple Fares	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Internal Capacity - New and Improved Services	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Kirklees Year of Music 2023	21/03/2022	Gainshare Revenue	£850,000.00
Land Release Fund	07/07/2021	Funding Programmes	£82,125.00
Large Bus Station Improvements (3c)	13/03/2023	Levelling Up Fund	£0.00
LBA Connectivity Package (Combined Authority)	28/03/2022	Transport Fund	£0.00
Leeds 2023 - Working with Women of the World (WoW Barn)	21/03/2022	Gainshare Revenue	£1,500,000.00
Leeds City Centre Network and Interchange Package - Boar Lane	11/05/2022	Transport Fund	£0.00
Leeds Flood Alleviation Step 2	02/03/2023	No Programme	£12,565,000.00
Levelling Up - Bus Enhancement Package	28/03/2023	Levelling Up Fund	£0.00
Local Sustainable Transport Fund	07/07/2021	Funding Programmes	£0.00
Local Transport Capital	07/07/2021	Funding Programmes	£0.00
Mass Transit Development and Delivery Programme (53)	25/10/2022	City Region Sustainable Transport Settlement	£31,887,500.00
Mayoral SME Graduate Programme	21/11/2022	Gainshare Revenue	£0.00
Mayors Cost of Living Emergency Fund	03/10/2022	Gainshare Revenue	£3,000,000.00
Mayors Fares (Fares Reduction and Simplification)	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00
Mobility Hubs (Phase 2)	30/09/2022	City Region Sustainable Transport Settlement	£50,000.00
Network Enhancements (New and Improved Services)	05/05/2023	Bus Service Improvement Plan (BSIP)	£0.00

Project Name	Start Date	Primary Funding Programme	Funding Awarded
Network Management Renewals and Enhancements - Bradford	24/08/2022	City Region Sustainable Transport Settlement	£1,475,000.00
Network Management Renewals and Enhancements - Calderdale	02/09/2022	City Region Sustainable Transport Settlement	£280,000.00
Network Management Renewals and Enhancements - Kirklees	02/09/2022	City Region Sustainable Transport Settlement	£1,006,250.00
Network Management Renewals and Enhancements - Leeds	02/09/2022	City Region Sustainable Transport Settlement	£1,657,500.00
Network Management Renewals and Enhancements - Wakefield	02/09/2022	City Region Sustainable Transport Settlement	£875,000.00
Network Management Renewals and Enhancements Documentation Library	11/11/2022	City Region Sustainable Transport Settlement	£0.00
New Stations Fund	07/07/2021	Funding Programmes	£0.00
NFM Landscapes for Water	01/03/2023	Gainshare Revenue	£0.00
NFM Wortley Beck Renaturalisation	14/03/2023	Gainshare Revenue	£0.00
NFM Wyke Beck Culvert Bypass	06/02/2023	Gainshare Revenue	£82,000.00
NSF - Thorpe Park Station	01/04/2021	DfT New Station Fund	£7,000,000.00
NSF - White Rose Station	01/04/2021	DfT New Station Fund	£5,000,000.00
Project Marigold	01/04/2021	No Programme	£0.00
Rail Accessibility - Large Scale Station Improvements (41)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Rail Accessibility - Leeds Station Platform Extensions (52)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Rail Accessibility - Small Scale Station Improvements (41)	06/12/2022	City Region Sustainable Transport Settlement	£245,000.00
Regional Pilot Decarbonisation - Kirklees EV Programme (42)	06/12/2022	City Region Sustainable Transport Settlement	£110,000.00
Safer Roads - Bradford	11/07/2022	City Region Sustainable Transport Settlement	£1,448,750.00
Safer Roads - Calderdale	11/07/2022	City Region Sustainable Transport Settlement	£557,500.00
Safer Roads - Kirklees	11/07/2022	City Region Sustainable Transport Settlement	£1,168,750.00
Safer Roads - Leeds	11/07/2022	City Region Sustainable Transport Settlement	£2,152,500.00
Safer Roads - Wakefield	11/07/2022	City Region Sustainable Transport Settlement	£922,500.00
Safer Roads Documentation Library	11/11/2022	City Region Sustainable Transport Settlement	£0.00
SHDF - Accent	26/04/2022	Social Housing Decarbonisation Programme	£339,451.00
SHDF - Connect Housing Association	26/04/2022	Social Housing Decarbonisation Programme	£410,615.00
SHDF - Horton Housing	26/04/2022	Social Housing Decarbonisation Programme	£114,933.00
SHDF - Incommunities	26/04/2022	Social Housing Decarbonisation Programme	£1,310,574.00
SHDF - Kirklees Council	26/04/2022	Social Housing Decarbonisation Programme	£263,234.52
SHDF - Programme Management	16/08/2022	Social Housing Decarbonisation Programme	£43,038.00
SHDF - Stonewater	26/04/2022	Social Housing Decarbonisation Programme	£383,786.00
SHDF - Together	26/04/2022	Social Housing Decarbonisation Programme	£774,650.00
SHDF - Wakefield District Housing	26/04/2022	Social Housing Decarbonisation Programme	£972,333.00
SHDF - Yorkshire Housing	26/04/2022	Social Housing Decarbonisation Programme	£193,392.00
SHDF Booster - Accent	13/01/2023	Gainshare Revenue	£186,535.00
SHDF Booster - Chartford (Horton Housing)	13/01/2023	Gainshare Revenue	£154,000.00
SHDF Booster - Connect	13/01/2023	Gainshare Revenue	£308,000.00
SHDF Booster - Incommunities	13/01/2023	Gainshare Revenue	£1,084,230.00
SHDF Booster - Kirklees	13/01/2023	Gainshare Revenue	£280,000.00
SHDF Booster - Programme Management	06/02/2023	Gainshare Revenue	£397,639.00
SHDF Booster - Together	13/01/2023	Gainshare Revenue	£1,700,545.00
SHDF Booster - WDH	13/01/2023	Gainshare Revenue	£847,000.00
SHDF Booster - Yorkshire Housing	13/01/2023	Gainshare Revenue	£238,000.00
SHDF Social Housing Decarbonisation Fund - PAN Charges	11/04/2023	Social Housing Decarbonisation Programme	£199,356.00
Skills Bootcamps	07/03/2022	DFE Skills Bootcamps	£0.00
Skills Connect	04/05/2022	DFE Skills Bootcamps	£0.00
Small Centres Bus Station Improvements (3b)	13/03/2023	Levelling Up Fund	£0.00
Social Housing Decarbonisation Fund	08/11/2021	Funding Programmes	£0.00

Project Name	Start Date	Primary Funding Programme	Funding Awarded
Steeton and Silsden Cycling and Walking Improvements	09/08/2022	City Region Sustainable Transport Settlement	£0.00
Supporting Local Business Pledge Development Programme	13/01/2023	Gainshare Revenue	£500,000.00
Sustainable Transport - Bradford Interchange Bus Refurb (56)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Bus Infrastructure (SAEP) (58)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Bus Shelters Refurbishment (57)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Bus Station Refurbishment (59)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Halifax Streets for People (30)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Highway Works (SAEP) (58)	24/11/2022	City Region Sustainable Transport Settlement	£0.00
Sustainable Transport - Kirklees Speed Limit Review (43)	06/12/2022	City Region Sustainable Transport Settlement	£25,000.00
Sustainable Transport - Leeds Healthier Streets (31)	06/12/2022	City Region Sustainable Transport Settlement	£210,000.00
Sustainable Transport - Wakefield City LCWIP1 extension (49)	06/12/2022	(blank)	£0.00
Sustainable Transport - WY Places - Bradford (47)	06/12/2022	City Region Sustainable Transport Settlement	£40,000.00
Sustainable Transport - WY Places - Calderdale (47)	06/12/2022	City Region Sustainable Transport Settlement	£40,000.00
Sustainable Transport - WY Places - Kirklees (47)	06/12/2022	City Region Sustainable Transport Settlement	£40,000.00
Sustainable Transport - WY Places - Wakefield (47)	06/12/2022	City Region Sustainable Transport Settlement	£40,000.00
TCF - Dewsbury Bus Station (Kirklees)	02/06/2023	Transforming Cities Fund (TCF)	£33,825.00
TCF - Leeds City Bikes	13/05/2021	Transforming Cities Fund (TCF)	£2,000,000.00
TCF - Risk - Contingency - Inflation	30/09/2021	Transforming Cities Fund (TCF)	£1,020,863.00
TCF - Zero Emission Bus Regional Area	12/10/2021	Transforming Cities Fund (TCF)	£50,000.00
Training (Test Project)	01/01/2022	No Programme	£250,000.00
Transformational - Wakefield Transport Model	09/03/2022	Transport Fund	£0.00
Transformational - West Yorkshire Strategic Transport Model	28/01/2022	Transport Fund	£0.00
Transforming Cities Fund - PAN charges	24/03/2022	Transforming Cities Fund (TCF)	£3,931,695.00
Transforming Cities Fund - PAN Charges - York and North Yorks	29/01/2023	Transforming Cities Fund (TCF)	£454,534.00
Transport Fund	13/01/2022	Funding Programmes	£0.00
Wakefield Our Year of Culture 24	01/09/2023	Gainshare Revenue	£0.00
West Yorkshire Climate and Environment Plan - Wave 1	01/04/2023	Gainshare Revenue	£1,788,185.00
West Yorkshire Innovation Support Programme	01/04/2023	Gainshare Revenue	£5,550,376.00
West Yorkshire Integrated UTMC (Phase A) - Bradford Monitoring and Claim Entry (Combined Authority)	19/04/2021	Transport Fund	£0.00
West Yorkshire Plus Transport Fund - PAN charges	22/03/2022	Transport Fund	£0.00
West Yorkshire UK Shared Prosperity Fund Local Authority Hyper local delivery	01/10/2022	UK Shared Prosperity Fund (UKSPF)	£0.00
Wheldon Road Pedestrian and Cycle Bridge (29)	16/11/2022	City Region Sustainable Transport Settlement	£577,473.00
York - Programme	13/01/2022	Transport Fund	£0.00
York Central Access (Homes England)	27/04/2022	Transport Fund	£20,269,110.00
York Outer Ring Road Dulling - A19 to A64 Little Hopgrove - MRN	01/04/2021	No Programme	£0.00
ZEBRA - Zero Emission Bus Regional Area	07/03/2022	Zero Emissions Bus Regional Area	£1,940,994.00
ZEBRA (Zero Emission Regional Area) - Arriva	25/10/2022	Zero Emissions Bus Regional Area	£9,153,750.00
ZEBRA (Zero Emission Regional Area) - First Bus	25/10/2022	Zero Emissions Bus Regional Area	£6,891,403.00
ZEBRA (Zero Emission Regional Area) - Transdev	25/10/2022	Zero Emissions Bus Regional Area	£6,579,024.00
Zero Emission Buses - Community Transport Vehicles (60)	06/12/2022	City Region Sustainable Transport Settlement	£0.00
Zero Emission Buses (51)	24/11/2022	City Region Sustainable Transport Settlement	£0.00
(blank)	(blank)	(blank)	£1,430,137,737.95
<b>Grand Total</b>			<b>£1,833,458,328.47</b>



**Report to:** West Yorkshire Combined Authority

**Date:** 27 July 2023

**Subject:** **UK Shared Prosperity Fund (UKSPF)**

**Director:** Alan Reiss, Chief Operating Officer

**Author:** Heather Waddington, Head of Funding Strategy

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 report on 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”).
- 1.2 To note the recommendations made by the West Yorkshire UKSPF Local Partnership Group (LPG).
- 1.3 To approve the funding envelopes under Pillar 3 People and Skills and call areas to allow officers to develop the Invitation to Bid, and to authorise the Chief Executive to agree, prior to publication, the full Invitation to Bid document in consultation with the Mayor and the Chair of the Employment and Skills Committee.

## 2. Information

### Background

- 2.1 The £2.6bn UK Shared Prosperity Fund runs from 2022-25 and is made up of three key strands: Core, Multiply and Rural. It has three pillars –
  - Pillar 1 - Community and Place
  - Pillar 2 - Supporting Local Business and;
  - Pillar 3 - People and Skills (includes Multiply - one of the first People and Skills programmes aimed at addressing low levels of adult numeracy).

- 2.2 The allocation for West Yorkshire is **£80,486,557** (£68,002,877 for Core SPF and £12,483,680 for Multiply), plus an **additional £2,567,501** from the Rural England Prosperity Fund (otherwise referred to as the 'Rural Fund') which aligns with Pillars 1 and 2. The total is now **£83,054,058**, including an administration fee for fund management.
- 2.3 The Multiply and Core UKSPF Local Investment Plans were submitted in summer 2022 and have now been approved by Government. The Rural England Prosperity Fund Local Investment Plan Addendum was submitted in November 2022 and was approved in April 2023.

### **Progress Update**

- 2.4 Significant progress has been made to ensure the funding is deployed to deliver outcomes for the communities, business and people of West Yorkshire. Programmes to be funded will support delivery of the Mayoral pledges and priorities. To date £39.38m (60.3%) of the core UKSPF allocation of £65.28m has been contracted. This includes the contracting of the Safety of Women and Girls programme with each of the five local councils, Digital Enterprise and the Business Productivity Programme.
- 2.5 The Pillar 2 invitation to bid, following approval at the 16th March meeting, was published on the 17th April 2023 to call for projects which will support businesses to export, grow and to be resilient and a call to consider alternative business models. The invitation to Bid closed 2nd June 2023 with a number of applications received and the Fund being over subscribed. A further report will be presented in September to approve selected projects. This will be following advice from the UKSPF Local Partnership group and the Business, Economy and Innovation Committee.
- 2.6 The current overall UKSPF position can be summarised as follows with progress made in the right-hand column;

<b>Pillar</b>	<b>LOCAL INVESTMENT PLAN AREAS</b>	<b>Funding</b>	<b>Progress Made</b>
Communities & Place Support for Business People and Skills	£30m LA 'Hyper local' Allocation <ul style="list-style-type: none"> <li>Bradford £7,578,145</li> <li>Calderdale £2,764,079</li> <li>Kirklees £5,824,858</li> <li>Leeds £9,393,538</li> <li>Wakefield £4,439,381</li> </ul>	£30m	Funding Agreements now in place with each LA and delivery has commenced.
Communities & Place	West Yorkshire Flood Innovation Programme (FLIP)	£310k	Funding Agreements now in place and delivery has commenced.
	Women and Girls Outreach Programme	£972k	Funding Agreements now in place and delivery has commenced.
Support for Business	(1) Business Productivity Programme	£3.5m	Funding Agreement now in place and delivery has commenced.
Support for Business	(2) Digital Enterprise	£4.67m	Funding Agreement now in place and delivery

Pillar	LOCAL INVESTMENT PLAN AREAS	Funding	Progress Made
			has commenced (July 2023)
Remaining funds Pillar 2	Three Call areas; Export and Internationalisation (Est. (£1.3m revenue), Alternative Business Models pilot (Est. £500k revenue) and Innovation for Business Resilience and Growth (Est. £10m - £6.4m revenue and £3.6m capital).	Est. £11.8m	Invitation to Bid closed 2 <sup>nd</sup> June 2023 – Bids received and now in appraisal – approvals to be sought by the Combined Authority in September 2023.
People and Skills	Proposed Plan (See Section 2.15 below) <ul style="list-style-type: none"> <li>• Employment WY</li> <li>• Skill areas for open calls <ul style="list-style-type: none"> <li>○ Work and Health Programme</li> <li>○ Community Grants Programme</li> <li>○ Youth Unemployment</li> </ul> </li> </ul>	£14m	Implementation Plan in development (See Section 2.15 below)

UKSPF Core Total for Delivery		£65.2m	
Rural Fund	Business Development, Food Processing and Visitor Economy / Tourism Infrastructure (£855k each)	£2.56m	Fund Launched April 2023
Multiply –	<ul style="list-style-type: none"> <li>• Individual Focused</li> <li>• Business Focussed</li> <li>• Capacity Building</li> </ul>	£11.3m	Funding Agreements in place for 4 of the 6 workstreams. £1,950,000 left to commission

2.7 The Combined Authority has now submitted its first return to Government representing 48.93% of the first-year allocation. Subsequently a Project Change Request (known as a Credible Plan) to roll over Year 1 underspend into Year 2 was submitted to government by the 2 May 2023 and has now been approved.

2.8 Whilst good progress is being made in West Yorkshire there are a number of operational challenges which officers are in further discussions with Government officials with including;

- Delays to programme launch and approval including the time to approve the Credible Plan (roll over of underspends from year 1 to year 2) has impacted on speed of delivery and spend to date.
- The overall intervention design, annual capital and revenue annual allocations and associated output and outcomes all add to the complexity of the fund together with the timing to report back to Government.
- Changes to Government guidance - interventions and metrics has increased complexity of monitoring, assurance and reporting.
- Currently there is no provision for roll over from year 2 to year 3 so further risk to funds if not spent in year.

## The Rural Fund

- 2.9 The Rural Fund Local Investment Plan Addendum received approval from Government on 7th April 2023 and was launched across West Yorkshire on 24th April 2023. The Fund will deploy rural capital grants to rural micro and small businesses under the following themes:
- Business Development (£855k)
  - Food Processing (£855k)
  - Visitor Economy / Tourism Infrastructure (£855k)
- 2.10 To date 47 enquiries have been received, 19 progressing to outline application stage and of the 19, 12 are now progressing to full application and one business has to date been awarded a grant under the Business Development theme. Work is ongoing, working with a small number of key rural partners, to further promote this funding opportunity to their members.

## Multiply

- 2.11 Multiply is an adult numeracy programme, led by the Department for Education (DfE) as part of the UKSPF. The programme covers the following areas:
- Strand 1 - Individual engagement - £4.7 million
  - Strand 2 - Business focussed activity - £3 million
  - Strand 3 - Capacity building for the sector - £3.6 million
- 2.12 Approximately 2,000 WY residents were supported by Multiply in year 1. Of the £3.4m allocation, £2m has been spent on delivery with an underspend of £1.41m which has been claw backed by Government despite a letter being sent from local MPs to Ministers to ask for this to be retained in the region. This is due to a range of factors including the start date of the initiative and local councils finding it challenging to deliver the 'outreach to parent strand' of the community focussed delivery due to the time needed to embed relationships with schools.
- 2.13 **Strand 1** - delivery is complete for year 1 with plans now focused on year 2. FE Booster programmes have exceeded both the DfE and partner target profiles targets for Year 1 in terms of participation.
- 2.14 **Strand 2** - the Business Training tender specification closed on 18<sup>th</sup> April 2023. Applications have been assessed and the following to move to contract award:
- Calderdale College (Business Training and Numeracy Champions)
  - National Numeracy (Numeracy Champions)
  - Realise Learning and Employment (Business Training and Numeracy Champions).



2.15 **Strand 3** - Capacity building for vocational and community tutors (£1.15m) has been successful overall - 406% engagement against DfE profile and spend of 96% against profile. A further £650,000 is planned to be commissioned in year 2 and 3. The Capacity Building for front line staff (£1.8m) specification is currently being developed.

**Pillar 3 – People and Skills – Approval Sought**

2.16 In the Local Investment Plan (LIP) submitted to Government in summer 2022, the Combined Authority acknowledged a need to break cycles of deprivation with new models of longer-term support that progress people and onto sustained work with progression opportunities. Key challenges identified were.

- the need to ensure more people are ready for work in our region
- promoting work as a good option for better health, wealth and well-being
- the need for green and digital skills in the region
- investing in a regional community grants programme.

2.17 £16.65m was allocated to Pillar 3 : People and Skills – split £2.65m for hyper local delivery, via partner councils, and £14m for regional projects. The approval sought below relates to the plans for the deployment of the remaining regional £14m.

2.18 At the time of submitting the LIP Lead Local Authorities were not allowed to invest in Pillar 3 for the first two years of UKSPF (with some limited exceptions) all the funding was in 2024-25 year 3 (YR3). On the 23 March 2023 the Department for Levelling Up, Housing & Communities lifted this restriction. However, Lead Authorities were not allowed to bring forward YR3 budgets, only to use this flexibility by utilising underspend from year 1 or any funding from year 2. In West Yorkshire given funding was already allocated/committed then the only small benefit was to move £150K from Pillar 1 to Pillar 3 for a small skills pilot under the hyper local council programme.

2.19 The Combined Authority is asked to support a proposal, recommended by the Employment and Skills Committee that met on 13 July and the advice from UKSPF Local Partnership Group 15<sup>th</sup> June, for the use of the **£14m** which is in summary;

Employment West Yorkshire	£4m	Named project in the UKSPF LIP - existing programme working with 5 partner councils using gainshare funding that will be substituted in year 3 with UKSPF – under the principle that gainshare is the funder of last resort.
Work and Health Programme	£4m	Open Call for Projects
Community Grants Programme	£4m	Open Call for Projects

Youth Unemployment Programme	£2m	Open Call for Projects
<b>Total Funding</b>	<b>£14m</b>	

- 2.20 **Employment West Yorkshire (£4 million)** - Employment West Yorkshire is a named programme in the Local Investment Plan approved by Government. The programme began delivery in April 2023 and is being delivered by the five Local Authorities and coordinated by West Yorkshire Combined Authority using £12m of gainshare funding. As part of this business case it was agreed UKSPF would be used during the second year of delivery where the programme scope did not significantly change and where the programme would help deliver the UKSPF interventions, outputs and outcomes.
- 2.21 £4m of UKSPF funding to be used to support the second year of delivery. Officers will progress the change of funding source via the Combined Authority's Assurance Framework ready for an April 2024 delivery start date if approved.
- 2.22 The remaining funding, based on labour market need and the recommendations of the Employment and Skills Committee with responsibility for oversight of the employment and skills pipeline, to support a small number of open calls:
- **Work and Health Programme (£4m)** – To support interventions to help people and households towards removing health barriers to work. This Call will address inequalities within the labour market and support whole households to access good, well-paid jobs and further support those with complex health-related barriers to employment.
  - **Community Grants Programme (£4m)** – To support those furthest from the Labour Market - provision should connect with existing Employment West Yorkshire provision by making and receiving referrals. Proposals should consider addressing specific barriers to groups of individuals including, but not limited to prison leavers, over-50s. Specific interventions might include careers programmes, employer toolkits, digital exclusion and supported work placements.
  - **Youth Unemployment (£2m )** - to be used to secure a partnership with a provider that can work with partners to support the delivery of the DWP blueprint for Youth Hubs across West Yorkshire to support young people to help them gain skills, develop confidence to gain work and increase employer contact.
- 2.23 A sounding group, with over 150 stakeholders, was held on 28<sup>th</sup> June 2023 to allow partners to help shape the design of the calls. Feedback from the event is being considered in the final drafting of the Invitation to Bid.
- 2.24 The LPG endorsed the overall allocations and approach to developing the Calls at its meeting on 15<sup>th</sup> June 2023 including the proposed funding

envelopes and key policy areas for intervention as set out above. LPG feedback noted that the Community Grants Call should be a key priority and a way for the voluntary and community sector partners to help deliver the key priorities. The Employment and Skills Committee were also supportive and asked for officers to further consider the minimum ask for match funding. Their feedback and advice will be taken into account as the Invitation to Bid is finalised. The intent is to have the Invitation to Bid ready to be approved and to be launched by the end of this summer 2023. Proposed timeline is;

- Publication of the Invitation to Bid – mid September 2023.
- Webinar with interested parties to help with bidding process – End of September 2023.
- Closing date for applications – mid November 2023 (6-8 weeks)
- Assessment of application – proposal this includes a role for partner councils taking into account conflicts of interest as well as Combined Authority Officers – Mid November to December 2023.
- Outcome of Assessment shared with ESC and LPG prior to formal approval and sign off – January 2024
- Contracting – February/March 2024
- Delivery commences – 1<sup>st</sup> April 2024

2.25 Once bids are received and assessed, the ESC will be asked to endorse and LPG will be asked for further advice on strategic fit and deliverability in line with the group's Terms of Reference before any formal project approvals are made to the Combined Authority.

2.26 As with any open call for projects, it is possible a situation may arise where the Combined Authority are not able to have the confidence to contract with partners to deliver within the twelve months. This may result in an opportunity to consider moving funds across the other two UKSPF Pillars (Support for local business and Communities and Place) in order to maximise this resource to the region.

2.27 Should this occur, a decision will be sought from the Finance, Resources and Corporate Committee under the existing delegation.

2.28 The Combined Authority is requested to approve the funding envelopes and priority areas for the three calls for projects via an invitation to bid, and authorise the Chief Executive to take the next steps as set out in the recommendations.

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

3.1 As a minimum, any investments under the UKSPF should meet the Government's clean growth principle and must not conflict with the UK's legal commitment to cut greenhouse gas emissions to net zero by 2050.

3.2 Tackling the Climate Emergency is at the heart of the objectives for the West Yorkshire Investment Strategy and tackling the climate emergency is a key investment priority, which will be used to guide our investments under the UK Shared Prosperity Fund.

- 3.3 Multiply activity will not directly target climate emergency; however, commissioning will ensure that good practice in energy conservation is embedded in delivery.
- 3.4 Through the Rural Fund activity there is a clear opportunity for businesses to develop more energy efficient and low carbon initiatives and the investment could have significant impacts on their sustainability which in turn will help support the cost of living and energy crisis. There is also an opportunity to support productive and sustainable farming and food production alongside environmental and climate outcomes improvements through the Food processing support which could support businesses as part of the move to a low carbon economy.

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

- 4.1 Inclusive Growth is core within the Investment Priorities of the WYIS to ensure everyone benefits from the investments made across the region. In addition, the Inclusive Growth Framework forms a core part of the Strategic Economic Framework which guides the priorities of the WYIS, which will be used to guide our investments under the UK Shared Prosperity Fund.
- 4.2 Multiply and Pillar 3 : People and Skills supports the inclusive growth agenda by increasing the skills and employability of low skilled residents, connecting them to employment opportunities.
- 4.3 In line with CA policy, it will be mandatory for businesses in receipt of grant support of £25,000 and above to undertake at least one Inclusive Growth and applications below that value will be encouraged to make a voluntary commitment.

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

- 5.1 Reducing inequality is a cross cutting theme within the Investment Priorities of the WYIS to ensure that investments made across the region support equality and diversity, and these principles will be used to guide and target our investments under the UK Shared Prosperity Fund.
- 5.2 An Equality Impact Assessment (EQIA) Stage 2 has been completed for the UKSPF Programme as a whole, with a specific EQIA (stage 2) also undertaken for Multiply, considering the positive interventions that can be made.
- 5.3 Multiply will be targeted towards individuals with low skills (below level 2 in numeracy). We are awaiting conclusive information on data collection from DfE, however it is anticipated that systems will be able to monitor the uptake of provision in some underrepresented groups and disadvantaged communities.
- 5.4 The proposed Pillar 3 Call areas will be developed to have targets attached to ensure proactive engagement with underrepresented groups, including

women, Black and Minority Ethnic groups, and people with disabilities. Work will be undertaken to ensure key, influential networks are engaged and that services to be delivered are proactively promoted and easily accessible to all.

- 5.5 All grant providers and contracted providers are required to complete an Equality Impact Assessment specific to their provision within 2 months of signing a contract with the Combined Authority. Providers are requested to develop an action plan to ensure their engagement will target the communities of need within West Yorkshire. Equality, diversity and inclusion indicators and demographic characteristics will be collected as part of reporting and contribute to performance management.
- 5.6 Reducing inequality is a cross cutting theme within the Investment Priorities of the WYIS to ensure that investments made across the region support equality and diversity, and these principles will be used to guide and target our investments under the UK Shared Prosperity Fund.
- 5.7 The Rural Fund is also aligned with the Government's levelling up mission and aims to close the gap between urban and rural productivity and workplace-based earnings given they are traditionally lower in rural areas than in urban areas by supporting the agricultural transition and boosting productivity through the provision targeted support to micro and small businesses in rural areas.

## **6. Financial Implications**

- 6.1 The Lead Authority, as outlined above, will be responsible for the devolved funding of £80.48m UK Shared Prosperity Fund – core SPF £68m, £12.48m Multiply and £2.56m from the Rural Fund, total £83.05m.
- 6.2 The Combined Authority has now resigned the Memorandum of Understanding with Government to incorporate the Rural Fund with the core UKSPF. As with Multiply, the Combined Authority will be liable for any expenditure the Secretary of State determines to be ineligible and any ineligible expenditure will be recovered from the Combined Authority. The Combined Authority will consequently need to enter into funding agreements with any successful applicants to the fund and will pass on any government contractual obligations as set out in the Governments technical guidance.
- 6.3 Funding will be paid to the Combined Authority annually in advance. Delivery partners will be paid quarterly in arrears based on a submitted and authorised claims to manage any risk to the authority. Currently pending approval of any approved 'credible plans' to roll over any unspent funding from one year to the next, any in year underspends are at risk. At the end of the three years any underspend will be returned to Government.
- 6.4 As Lead Authority the Combined Authority has received capacity funding of £40,000 for the work undertaken to develop and submit the Core Investment Plan (Not Multiply).

- 6.5 The Combined Authority can use up to 4% of their allocation to undertake necessary Fund administration, such as project assessment, contracting, monitoring and evaluation and ongoing stakeholder engagement. Some of this funding has now been allocated to partner local authorities to assist with the management of the fund. This funding will also now need to be used to support the work to be carried out to manage the Rural Fund as no further management fee is to be paid for this purpose.
- 6.6 This paper sets out the proposed use of the £14m allocation to Pillar 3 People and Skills to be included in an invitation to bid for open Calls.
- 6.7 For Multiply the balance of funding across the workstreams approved by the Combined Authority will need to be considered in light of performance and underspend clawback, particularly the significance of any impact on the investment plan values/proportions allocated. Any proposed changes will be brought to the Combined Authority for consideration. At this point the priority is to retain and maximise the funding to West Yorkshire, as opposed to returning it to Treasury.

## **7. Legal Implications**

- 7.1 The Combined Authority has received a grant determination letter for Multiply and a Memorandum of Understanding for the core UKSPF setting out Fund requirements and obligations for the amount confirmed with Government and will be responsible for managing these funds accordingly. As the accountable body, the Combined Authority will enter into a funding agreement with each local delivery partner as schemes are approved. To manage risks any contractual obligations set out by Government will be passed down accordingly.
- 7.2 The Combined Authority has following Government approval, entered into a MoU for the Rural Fund provision in West Yorkshire.

## **8. Staffing Implications**

- 8.1 Whilst the majority of resources are now in place following recruitment, given the work required to administer the new Fund the expectation several additional posts may be required, to be funded from the management fee.

## **9. External Consultees**

- 9.1 The UKSPF Local Investment Plans sets out the list of external consultees in the development of the Investment Plans.

## **10. Recommendations**

- 10.1 That the Combined Authority note the progress made on implementing the West Yorkshire UKSPF Local Investment Plans.

10.2 That members note and approve the recommendations made by the West Yorkshire UKSPF Local Partnership Group on its 31<sup>st</sup> July 2023 meeting which are:

- the LPG endorsed the design of the Calls including the proposed funding envelopes and key policy areas for intervention as set out above, providing their feedback and advice is taken in to account as the Invitation to Bid is finalised.

10.3 To approve the funding envelopes and priority areas for the three Pillar 3 People and Skills open calls for projects via an invitation to bid, and authorise the Chief Executive to agree, prior to publication, the full Invitation to Bid documentation in consultation with the Mayor and the Chair of the Employment and Skills Committee given the launch timescales.

## **11 Background Documents**

- [West Yorkshire UKSPF Local Investment Plan](#)
- [West Yorkshire Multiply Local Investment Plan](#)
- [West Yorkshire Rural England Prosperity Fund Addendum](#)

## **12 Appendices**

None.

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**Report to:** West Yorkshire Combined Authority

**Date:** 27 July 2023

**Subject:** **Appointment of Combined Authority Returning Officer**

**Director:** Alan Reiss, Chief Operating Officer

**Author:** Rebecca Brookes, Legal Corporate Service 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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this report

- 1.1 To agree to appoint Tom Riordan, Leeds City Council Chief Executive and Local Returning Officer, as the Combined Authority Returning Officer (CARO) in respect of the West Yorkshire Combined Authority Mayoral election, due to take place on Thursday 2 May 2024.
- 1.2 To note the intention that Ben Still, Chief Executive of the Combined Authority will be appointed as a deputy CARO.

## 2. Information

- 2.1 The Combined Authorities (Mayoral Elections) Order 2017 provides that each Combined Authority must appoint one of its officers or one of the officers of a constituent council to be the Combined Authority Returning Officer (CARO). If the latter this will normally be a Local Returning Officer.
- 2.2 The CARO will have overall responsibility for the election of the Mayor. In addition, the CARO will be responsible for accepting nominations and coordinating the regional result.

- 2.3 As this is a legal requirement, there are no other options other than to formally appoint a CARO to ensure the Combined Authority undertake their statutory duty and to ensure that the election is fair, transparent and that everyone has confidence in the result.
- 2.4 Following local discussions, it is proposed that the Chief Executive of Leeds City Council, Tom Riordan, be appointed to this position and that he be supported by the Combined Authority's Chief Executive, Ben Still, as one of his Deputy CARO's, alongside any other deputy appointments the CARO chooses to make. The formal appointment of deputies a matter for the CARO.
- 2.5 This appointment mirrors the arrangements that were put in place for the 2021 Mayoral election. It reflects a recognition of the extremely complex arrangements involved in the running of any election with the need for an experienced CARO to lead the process alongside a similarly experienced elections team. This appointment would instil confidence in the elections process and the integrity of the election itself.
- 2.6 Combined Authority officers are working closely with the Electoral Services Manager at Leeds City Council to support election preparations and will agree pragmatic allocation of responsibilities, including but not limited to preparation of the election booklet, which is a statutory requirement.

### **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 Costs associated with the Mayoral Election are subject to confirmation and will need to be met from Combined Authority funds. Unlike for local authority elections there is no funding from government for mayoral elections.

### **7. Legal Implications**

- 7.1 The legal requirement for the Combined Authority to appoint a CARO is set out in the body of the report.

### **8. Staffing Implications**

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

**9. External Consultees**

- 9.1 Leeds City Council's Head of Electoral Services has confirmed support for the proposed CARO appointment.

**10. Recommendations**

- 10.1 To agree to appoint Tom Riordan, Leeds City Council Chief Executive and Local Returning Officer, as the Combined Authority Returning Officer (CARO) in respect of the West Yorkshire Combined Authority Mayoral election, due to take place on Thursday 2 May 2024.
- 10.2 To note the intention that Ben Still, Chief Executive of the Combined Authority will be appointed as a deputy CARO.

**11 Background Documents**

None.

**12 Appendices**

None.

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Report to: West Yorkshire Combined Authority

Date: 27 July 2023

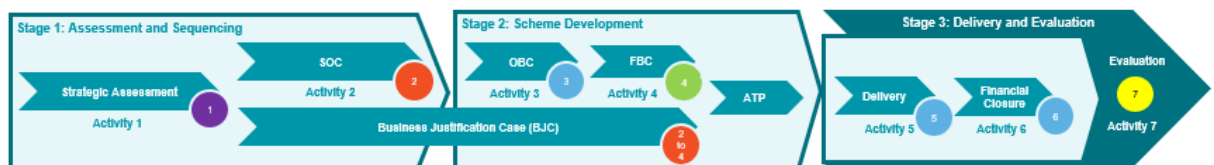
Subject: Project Approvals - Investment Priority 3 – Creating Great Places and Accelerated Infrastructure

Director: Liz Hunter, Director of Policing, Environment & Place

Author: Craig Taylor, Head of Portfolio Management and Appraisal

## 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.

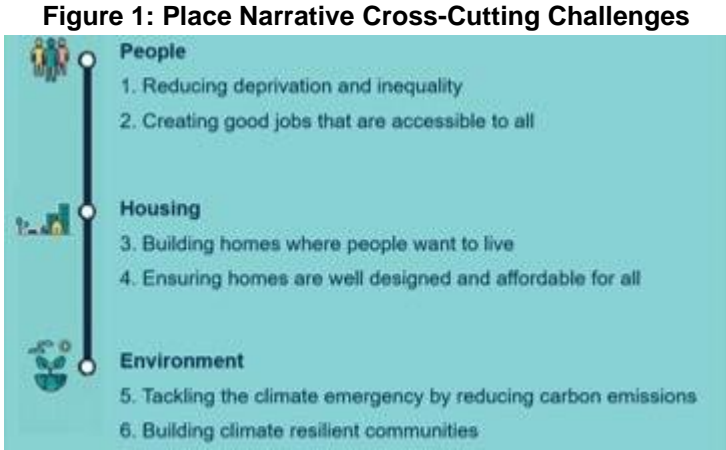
## 2 Report

- 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 Investment Priority (IP) 3: Creating Great Places and Accelerated Infrastructure, 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 Combined Authority and the Mayor.

3.2 The Place Narrative<sup>1</sup> provides a level of strategic context for what we want to achieve through investment in place-based activity and the IP3 Portfolio. The Narrative identifies six cross-cutting place-based challenges which underpin our strategic approach to infrastructure programme and delivery.



3.3 The challenges confirm that despite a thriving economy in parts of the region, not all of our communities feel the benefits of that growth. Increasing polarisation between communities and tackling the climate emergency requires action across all parts of the economy and infrastructure delivery.

3.4 The IP3 Portfolio identifies a range of themes with potential for a significant positive impact on the priorities outlined in the West Yorkshire Investment Strategy. The IP3 Portfolio contains a suite of programmes and projects within one or more of the following themes:

- Housing and Regeneration
- Employment Land
- Spatial Priority Areas
- Flood Infrastructure
- Digital Infrastructure
- Natural Environment and Green Infrastructure
- Safer and Stronger Communities (Safer Parks)

3.5 Our proposed investments in place making, infrastructure and programme development activity aims to shape places in a way that responds to these key challenges. In developing the priorities for the IP3 Portfolio it is useful to reflect on the extent to which investments will help to tackle these challenges.

3.6 Many of the themes specifically provide support and enabling capacity to the commercial sector where there is evidence of market failure. This can be due to a lack of commercial appetite/return or areas which cannot be delivered

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<sup>1</sup> The Narrative was produced in partnership with the Place Panel (the advisory panel that preceded Place, Regeneration and Housing Committee).

commercially e.g. a public good, such as Green Infrastructure. Other themes support our public sector partners to deliver our shared objectives.

- 3.7 The 2 schemes detailed in this report are associated with the first three IP3 themes. The projects are on either end of the spectrum in terms of development cycle that highlights the range of activities that the IP3 portfolio covers.
- 3.8 The Employment Land Accelerator fund proposal reflects on the key learning outcomes from the Growth Deal –Independent Assessment Evaluation, specifically the Enterprise Zones programme and the recent Strategy Employment Land Review undertaken by Hatch. Both highlighted that the Combined Authority needs to have a better understanding of the West Yorkshire employment sites pipeline, and the potential challenges in bringing sites forward. Through developing the Business Justification Case for this project and consultation with partner councils it has been identified that a future pipeline should include focus on market demand by sector, site ownership issues and physical challenges at sites.
- 3.9 Strengthening our intelligence on employment sites across the pipeline is a priority to ensure we are able to maximise the deliverability of sites to attract private sector investment and to be ready to put forward funding bids.
- 3.10 The Employment Land Accelerator forms part of a wider suite of programmes targeting strategic sites for example it aligns with the Housing Accelerator Fund, development of Spatial Priority Areas as well as ongoing work on the West Yorkshire Investment Zone and the Strategic Place Partnership.
- 3.11 The Langthwaite Enterprise Zone is in the South Kirkby and South Elmsall Urban Extension Spatial Priority Area and is under the Combined Authority's direct ownership. The scheme seeks to secure approval to undertake direct infrastructure investment to facilitate the development of the site. Through securing ownership of the adjacent land, development of an access and creation of development platforms, it will unlock the future development of the site, which subject to the final Masterplan, will be capable of accommodating circa 26,942 sqm of commercial and employment space by December 2027. Further work is needed on the opportunity for the use of the site. Given its location next to Production Park and other businesses in the creative industry supply chain, the CA will look to build on these agglomeration benefits when considering occupiers. This also aligns with the Mayor's Creative New Deal objectives.

## Scheme summaries

<p><b>Employment Land Accelerator Fund</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme looks to engage with the five West Yorkshire partner councils to create a pipeline of potential employment sites. The scheme will develop an understanding of employment site opportunities, that can then be explored further with the use of consultancy support. This will allow options to be identified to accelerate employment site delivery in the future.</p> <p>The scheme will be funded by the Combined Authority’s Single Investment Fund (SIF).</p> <p><b><u>Impact</u></b></p> <p>The scheme will create a pipeline of potential employment sites, to better understand opportunities for future investments. The number of sites on the pipeline will vary and will be prioritised to maximise outcomes and objectives for the Combined Authority.</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 - £2,000,000</p> <p>Total value of Combined Authority funding - £2,000,000</p> <p>Funding recommendation sought - £2,000,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Langthwaite Enterprise Zone – Wakefield</b></p>	<p><b><u>Scheme description</u></b></p> <p>The Langthwaite Enterprise Zone will unlock a 9.45 hectare site by delivering an access road and site remediation works.</p> <p>The scheme will be funded by Combined Authority’s Single Investment Fund (SIF).</p> <p><b><u>Impact</u></b></p> <p>The scheme will support and develop business growth in the region and realise the objective of “unlocking, enabling, and accelerating site development to deliver local economic growth”.</p> <p>The value for money assessment reflects a benefit cost ratio (BCR) 2.1 to 2.6. This is categorised as 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 - £12,678,000</p> <p>Total value of Combined Authority funding - £12,678,000</p> <p>Funding recommendation sought - £11,626,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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3.12 Since the Combined Authority's meeting on 22 June 2023, 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 Place, Regeneration and Housing 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 or enter scheme details.

## Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>Employment Land Accelerator Fund</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

- 4.4 The Employment Land Accelerator Fund seeks to utilise the Single Investment Fund (SIF) revenue funding to develop a pipeline of employment sites that is West Yorkshire wide, with the overarching aims to increase resilience of communities, accelerate and improve the quality of infrastructure, and drive inclusive and sustainable growth.
- 4.5 With a targeted, partnership-led approach to accelerating the development of employment sites, the scheme will identify opportunities to maximise employment investment and bring job growth to the region.
- 4.6 The scheme will engage with the five West Yorkshire partner councils and landowners/developers, utilising consultancy support, and investigate and assess potential employment site opportunities. The outcome will be a pipeline of sites identified for potential future development into employment sites; the pipeline will improve the region's ability to respond to funding opportunities.
- 4.7 The approach to assessing potential employment sites will be undertaken with a keen emphasis on strategy (at a local and regional level) including consideration of Spatial Priority Areas and sectoral growth. The assessment will be two stages, one creating a long list of strategic sites with a focus on Local Plans, sites already allocated for employment use, and brownfield land. The 2<sup>nd</sup> stage will reduce this to a shortlist of potential sites which will receive detailed specialist assessment.
- 4.8 The scheme will increase capacity and expertise related to employment pipeline projects at the Combined Authority and partner councils through partnership-led working and learning from the expert consultancy support.

- 4.9 A procurement exercise will be undertaken to establish a framework from which consultancy support will be drawn down.
- 4.10 By ensuring that a pipeline of high-quality employment sites is established it will support the Strategic Economic Framework's priorities of Boosting Productivity and Enabling Inclusive Growth.
- 4.11 The scheme will support the Mayoral pledges of:
- Creating 1,000 well paid, skilled jobs for young people
  - Supporting local businesses
- 4.12 A summary of the scheme's business case is included in **Appendix 1**.

### **Tackling the Climate Emergency Implications**

- 4.13 The scheme's tackling of the climate emergency implications are:
- Development of a site prioritisation framework / process that aligns with the Combined Authority's priorities and strategies, including the West Yorkshire Climate and Environment Plan.
  - Support the delivery of Local Plans that seek to address housing needs, economic development opportunities, and social and environmental priorities.
  - Create a dedicated and spatial approach to site development that aligns with climate, skills and infrastructure investments, driving better employment and investment outcomes.
  - Integrate commercial development opportunities with other investment programmes such as skills, infrastructure, transport and connectivity, renewables, and green space enhancements.
  - Long term increased employment opportunities in areas aligned to the Combined Authority's transport investments and accessibility data, therefore reducing travel demand and having a positive indirect benefit to carbon outputs.

### **Outputs and Benefits**

- 4.14 The scheme outputs and benefits include:
- To deliver a pipeline of sites, suitable for potential further investment to accelerate the delivery of employment sites. This will take place over the programme's lifetime, up to 2026.
  - To create an initial long list of 'strategic' sites based on factors including sites of strategic importance to developing key employment sectors, Spatial Priority Areas, size and scale of sites, and location of sites.
  - To increase local capacity and expertise related to employment pipeline projects at Local Authority level.
  - To improve the Combined Authority's readiness for future capital investment opportunities.

- To coordinate investment with partners to maximise growth, particularly in relation to the Combined Authority's Spatial Priority Areas.
  - To target interventions in a more strategic and coordinated way, aligning strategic land policies with investment priorities within the Combined Authority.
  - To support the delivery of the five West Yorkshire Local Plans.
  - To diversify employment opportunities and have a positive impact on economic development across West Yorkshire.
  - To reduce unemployment and enable inclusive economic growth.
- 4.15 A monitoring and evaluation plan will be developed during the delivery phase of this programme through which quantified outputs and benefits will be developed.
- 4.16 The scheme is expected to deliver good value for money.

### **Inclusive Growth Implications**

- 4.17 The scheme inclusive growth implications include:
- Supporting job growth across the region, facilitating inclusive growth, regeneration, housing delivery, and helping to address the climate emergency.
  - Contributing towards Local Authorities achieving their Local Plan objectives, addressing housing needs and other economic, social and environmental priorities for each area. Local Plans seek to manage growth in a sustainable way and to balance the overall scale, distribution and phasing of developments.
  - Enabling future investment opportunities into employment sites that will increase the proportion of jobs accessible by bus within 30 minutes.
  - Enabling future investment opportunities into employment sites that will increase the number of people in Good Work.

### **Equality and Diversity Implications**

- 4.18 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.
- 4.19 The scheme equality and diversity implications are:
- The EqIA demonstrates a correlation between some Equality and Diversity characteristics and / or minority groups and difficulty in accessing employment, particularly higher skilled jobs with corresponding higher incomes. By accelerating employment land generally, and particularly in areas where there are higher proportions of minority communities, there is an opportunity to address this.

- The scheme will look at the potential for including detail in the decision making / site prioritisation process regarding how the end user / developer might implement Equality and Diversity Impact policies.

## Risks

4.20 The key scheme risks and mitigations are:

- A risk that outputs and outcomes are not fully maximised due to ineffective site prioritisation. This will be mitigated through the application of the site prioritisation criteria and process, developed and implemented in collaboration with Local Authority partners, and giving careful consideration to strategy, local demand, and site criteria.
- A risk that variations in business markets, skills uptake, and external incentives for businesses, outside of the Combined Authority's control, could impact on demand and investment locally into new employment sites. This will be mitigated by taking a flexible and comprehensive approach to employment land pipeline development, enabling the Combined Authority to adapt to changes in demand, and to leverage funding more effectively from Government programmes.
- A risk that inflationary cost rises could potentially reduce the scope and number of sites where interventions can be funded, which would result in reduced programme outputs. Some aspects of this will be mitigated through the procurement of specialist consultancy support with a price structure that is agreed upfront.
- A risk that the priorities of key stakeholders, particularly Local Authority partners of whom the programme is dependent upon, could be misaligned. This will be mitigated through agreeing a clear methodology for the prioritisation criteria and process with stakeholders and applying this to all sites.

## Costs

4.21 The total scheme costs are £2,000,000.

4.22 The Combined Authority's contribution is £2,000,000 from the Single Investment Fund (SIF).

## Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
2 to 4 (business justification)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	01/09/2026

## Other Key Timescales

- The programme will commence delivery July 2023.
- The programme is expected to be completed September 2026.
- Project Evaluation is expected to be completed October 2026.

## Assurance Tolerances

Assurance tolerances
Combined Authority costs remain within +10% of those outlined in this report. Delivery (DP5) timescales remain within 6 months of those outlined in this report.

## Appraisal Summary

- 4.23 The scheme is an enabler for future investment opportunities, by ensuring that the Combined Authority and Local Authority partners are ready to effectively bid for funding that is presenting the chance to invest in employment site development and acceleration.
- 4.24 The scheme business case was rated overall as green and demonstrated a strong strategic case. The scheme supports delivery of the Combined Authority's key priorities, by enabling and accelerating employment site development, therefore diversifying and amplifying employment opportunities across the region and helping to achieve a stronger economy for West Yorkshire.
- 4.25 The scheme will be managed by the Combined Authority, in partnership with the partner councils, with the support of external specialist consultants. Value for Money has been considered Good for the scheme through a cost/unit calculation based on a similar programme with a budget that has been set by Government.

## Recommendations

- 4.26 The Combined Authority approves that:
- (i) The Employment Land Accelerator Fund 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 £2,000,000. The total scheme value is £2,000,000.
  - (iii) 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 Place, Regeneration and Housing Committee.

<b>Project Title</b>	<b>Enterprise Zone (EZ) Langthwaite Business Park Extension</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

- 4.27 The Enterprise Zone (EZ) Langthwaite Business Park Extension scheme was originally developed as part of the Leeds City Region EZ programme which has an overarching objective of “unlocking, enabling, and accelerating site development to deliver local economic growth”.
- 4.28 The Langthwaite site amounts to 9.45 hectares and is located to the north of Broad Lane and south of Langthwaite Grange Industrial Park in South Kirkby, Pontefract.
- 4.29 The Combined Authority contribution of £12,677,146 will enable the delivery of phase 1 of the site development plan by October 2024 and includes:
- Project development costs; detailed design, outline planning approval, Section 106 Agreement.
  - An extension to the existing industrial estate by providing an access road to the site from the existing Onward Way.
  - Full site de-risking works; remedial earthworks and site infrastructure such as services, roads and balancing ponds (collects surface water and releases into drainage system).
- 4.30 Subject to the final masterplan, a fully completed site could deliver 9 units by 2031 capable of accommodating commercial and employment space in the region of 23,053 sqm (248,200 sqft), and deliver 766 jobs, generating £136,300,000 of Gross Value Added (contribution to the economy). Future development on the site could deliver a total business rates income of approximately £11,000,000 to the Combined Authority up to 2042 (rates collected to contribute towards local services) and could yield a capital receipt in the region of £3,244,000.

- 4.31 Whilst the above is the current understanding on how the site development could be brought forward and the forecast timescales, the project team is still considering the final options. Several options are being considered on progressing plot sales and commercial arrangements with prospective developers, i.e., release plots in phases, sell the whole site at once, or the public sector directly delivers the site by entering lease/rent arrangements.
- 4.32 A summary of the scheme's business case and location map is included in **Appendix 2**.
- 4.33 To bring the site forward additional land purchase is required in order that the design for the access road can be completed to adoptable standards. The owner of the land adjacent to the access road has offered to sell their interest to the Combined Authority. Approval is needed for the purchase of this land which is essential to provide an adoptable access road and would enhance the site provision.

### **Tackling the Climate Emergency Implications**

- 4.34 A partial Carbon Impact Assessment has been undertaken considering the Carbon impact during construction. This would result in an increase of 3,261 tCO<sub>2</sub> into the environment. As the scheme develops with a greater certainty of its final use a full Carbon Impact Assessment will be undertaken to fully assess the schemes impacts.
- 4.35 The scheme will seek to increase biodiversity on the site by 10% by creating an open green space within the site, the development of new habitat in the form of containment ponds from a sustainable urban drainage system, and a new green walkway alongside the beck. Furthermore, the retaining structures on site will maximise the use of gabions and timber to promote habitat creation for flora and fauna on site.
- 4.36 The Onward Way access road will also include new footpaths and a cycle lane to enable walking and cycle trips as a modal choice to the site, reducing the reliance on the car and mitigating against further carbon emissions.
- 4.37 As part of the Planning process, inclusion of specific conditions on to the Developer will also be considered as part of bringing the full site forward, such as including cycle parking spaces and electric charging infrastructure.

### **Outputs and Benefits**

- 4.38 The scheme outputs and benefits are:
- Construction of the new site access road, extending the existing Onward Way by 0.19km.
  - Two way cycle lane and new footpaths as part of the extended Onward Way access road.
  - Site preparation and remediation works of 9.45 hectares of land, including site levelling, creation of development plots, and on site infrastructure including extending the road on the site and providing 2 balancing ponds for drainage.



- Unlocked land, which subject to the final Masterplan will be capable of accommodating 9 commercial units, equivalent to 23,053 sqm of commercial and employment space by December 2027.

4.39 A value for money assessment calculates a Benefit Cost Ratio (BCR) of between 2.1 and 2.6, classifying the scheme as High value for money.

#### **Inclusive Growth Implications**

- 4.40 The scheme supports principles of inclusive growth as it will unlock a site for future development which will create job opportunities, notably benefitting a low employment area of Wakefield but also residents across the West Yorkshire region.
- 4.41 The site sits in a Spatial Priority Area (SPA) and in addition to the delivery of employment opportunities on this site, it will act as a catalyst to the further development of the South Kirkby Urban Extension which includes 10 hectares of additional employment land and circa 900 new homes.

#### **Equality and Diversity Implications**

- 4.42 The scheme will produce an Equality Impact Assessment (EqIA) before moving into delivery as part of their approval to proceed. This will ensure the design of the Onward Way access road makes it accessible for all users, including those classed as a protected characteristic in the Equality Act 2010.
- 4.43 The EqIA assessment will also reflect on the cycle infrastructure to be designed as part of the Onward Way access road, including its compliance with the Department for Transport's Local Transport Plan Note 1/20 (LTN1/20).

#### **Risks**

- 4.44 The key scheme risks and mitigations are:
- Planning permission delayed impacting the ability to deliver the scheme. This risk has been mitigated by maintaining close liaison with Wakefield Council on Planning conditions and issues, with a tender also released for discharging planning conditions.
  - Failure to resolve land ownership and price negotiations, delaying construction of the Access Road and remediation works. This risk has been mitigated by continuing to have all land acquisition and design options available including an alternative access road design that would not be adopted highway.
  - Insufficient connections provided or available in a timely manner to enable the site to be sufficiently serviced by utility connections due to utility provider lack of resources, impacting the ability to bring the site development forward. This risk has been mitigated by the scoping of utility connections to be drawn out through new Pre-construction Service Agreements, with early engagement and quotations carried out to inform cost estimate and programme.

- Works to the Beck requires more substantial approvals and design, impacting costs and delivery timescales. This risk has been mitigated by maintaining engagement with the Lead Flood Officer at the Council and Planning Authority, and including a risk cost should a Flood Risk Assessment be needed.

## Costs

- 4.45 The total scheme cost is £12,678,000, and will be fully funded by the Combined Authority, of which:
- £11,626,000 from the Single Investment Fund (SIF)
  - £1,052,000 are historical costs which funded the early stages of business case development, of which £417,000 was funded from the Local Growth Deal and £405,000 from the Getting Building Fund. In addition £250,000 was approved by the Combined Authority meeting on 2 February 2023.
- 4.46 To support the scheme to progress from full business case to Approval to Proceed £350,000 of development funds are requested to be approved.
- 4.47 The Combined Authority scheme is not funding delivery of the commercial units, although it is still developing and finalising its asset development plan, which will explore plot sales and commercial arrangements with prospective Developers.
- 4.48 To note, at the outset of the EZ Programme, the Combined Authority purchased the site for £1,600,000, funded through the EZ Programme level Growth Deal approval.
- 4.49 Future sale of the site could yield a capital receipt in the region of £3,244,000 to the Combined Authority, whilst calculations indicate the Combined Authority could receive a total Business Rates Return income of £11,000,000 up to 2042.

## Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
4 (full business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
Approval to Proceed	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	13/09/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team	31/05/2025

	Decision: Combined Authority's Chief Operating Officer	
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### Other Key Timescales

- September 2023 - Planning consent secured.
- October 2023 - Start on site.
- May 2025 – Access Road and Remediation Construction works complete.

### Assurance Tolerances

Assurance tolerances
Combined Authority costs remain within +5% of those outlined in this report.
Delivery (DP5) timescales remain within +3 months of those outlined in this report.
Outputs: Remain within -10% of those outlined in this report.

### Appraisal Summary

- 4.50 The scheme at full business case supports the Combined Authority's strategic priorities as unlocking the site will enable development to come forward which will create jobs and economic benefits, notably as the Langthwaite site sits in a Spatial Priority Area.
- 4.51 The economic case showed a High value for money with a benefit to cost ratio of between 2.1 to 2.6
- 4.52 To strengthen the business case, there are a number of products it needs to revisit, such as the Equality Impact Assessment, Carbon Impact Assessment, and, Monitoring and Evaluation Plan. These will be developed before the project goes into delivery.
- 4.53 It is also recommended that the scheme secures approval of its asset development plan at the earliest opportunity. It is accepted that several options are available to the Combined Authority as to how future plot sales and full site development is taken forward. The project team has conveyed that there is market interest in the site.

### Recommendations

- 4.54 The Combined Authority approves that:
- The Enterprise Zone Langthwaite Business Park scheme proceeds through decision point 4 (FBC) and work commences on activity 5 (Delivery), subject to the conditions set by the Programme Appraisal Team.
  - Subject to the conditions set by the Programme Appraisal Team, approval of £11,626,000 is given, taking the total approval to £12,678,000. The total scheme value is £12,678,000.

- (iii) Approval of £350,000 development costs, from the total approval, taking the approval to date to £1,402,000.
- (iv) Approval for the purchase of additional land adjacent to Onward Way for provision of the access road.
- (v) 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 Place, Regeneration and Housing Committee.

## **Projects in Stage 3: Delivery and Evaluation**

4.55 There are no schemes to review at this stage or enter scheme details.

### **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.

### **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)**

#### **Employment Land Accelerator Fund**

12.1 The Combined Authority approves that:

(i) The Employment Land Accelerator Fund 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 £2,000,000. The total scheme value is £2,000,000.

- (iii) 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 Place, Regeneration and Housing Committee.

### **Enterprise Zone Langthwaite Business Park Extension**

12.2 The Combined Authority approves that:

- (i) The Enterprise Zone Langthwaite Business Park Extension scheme proceeds through decision point 4 (FBC) and work commences on activity 5 (Delivery), subject to the conditions set by the Programme Appraisal Team.
- (ii) Subject to the conditions set by the Programme Appraisal Team, approval of £11,626,000 is given, taking the total approval to £12,678,000. The total scheme value is £12,678,000.
- (iii) Approval of £350,000 development costs, from the total approval, taking the approval to date to £1,402,000.
- (iv) Approval be granted for the purchase of additional land adjacent to Onward Way for provision of the access road.
- (v) 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 Place, Regeneration and Housing Committee.

## **13 Background Documents**

13.1 None as part of this report.

## **14 Appendices**

**Appendix 1** – Employment Land Accelerator Fund Business Case Summary

**Appendix 2** – Enterprise Zone Expansions – Wakefield Langthwaite Business Case Summary

## Project Overview

Project Title	Employment Land
Main Funding Programme	Gainshare Funding
Current Forecast Project cost	£2,000,000
Funding Applied for from the Combined Authority now	£2,000,000
Other public sector funding amounts and sources	N/A
Private sector funding amounts and sources	N/A

## Scheme Description

The scheme seeks to utilise revenue funding to develop potential employment sites across West Yorkshire.

By engaging with the five West Yorkshire Partner Councils, the scheme will develop an understanding of employment site opportunities, that can then be explored further with the use of consultancy support.

This will allow options to be identified by the project team to help deliver new employment sites in the future.

## Business Case Summary

### Strategic Case

The Employment Land Accelerator Fund aligns with existing policies and strategies of the Combined Authority and local authorities, including Mayoral pledges to create 1,000 well paid, skilled jobs for young people; and to support local businesses and be a champion for our regional economy.

Key objectives of the programme are to:

- Improve understanding of employment land opportunities across West Yorkshire (Effectiveness)
- Improve ability to bid for funding and/or leverage additional funding from Government to deliver employment land (Efficiency)
- Increase ability to attract private investment, through detailed and early understanding of employment land opportunities (Efficiency)
- Alignment of employment sites to renewable energy and sustainable travel opportunities and interventions (Compliance)
- Detailed understanding of constraints to employment land delivery and where market failure exists (Economy)

### Economic Case

The scheme is expected to deliver good value for money.

### Commercial Case

Procurement will include commissioning work to look into site opportunities and provide a range of specialist skills and knowledge.

The Combined Authority has successfully procured similar services in the past and the scheme promoter has assured that there are significant levels of interest from the market for these services.

### Financial Case

The scheme is to be delivered through the Single Investment Fund (SIF); £2m from the Combined Authority's Gainshare Investment Priority 3 funding.

### Management Case

The scheme will be managed by the Combined Authority. A governance structure is in place consisting of a Project Delivery Team, who will manage the programme on a day-to-day basis, with any escalation or change management approvals being the responsibility of the Programme Board.



### Project Overview

Project Title	Langthwaite Enterprise Zone – Wakefield
Main Funding Programme	Strategic Investment Fund (SIF)
Current Forecast Project cost	£12,678,000
Funding Applied for from the Combined Authority now	£11,626,000
Other public sector funding amounts and sources	£417,000 from the Local Growth Deal £404,160 from the Getting Building Fund
Private sector funding amounts and sources	N/A

### Scheme Description

The scheme was originally developed as part of the Leeds City Region EZ programme which has an overarching objective of “unlocking, enabling, and accelerating site development to deliver local economic growth”.

The Langthwaite site amounts to 9.45 hectares and is located to the north of Broad Lane and south of Langthwaite Grange Industrial Park in South Kirkby, Pontefract.

The Combined Authority funding of £12,678,000 will enable the delivery of phase 1 of the site development plan by October 2024 and includes:

- Project development costs: such as completion to detailed design, secure outline planning approval, and finalising the Section 106 Agreement.
- Create an extension to the existing industrial estate by providing an access road to the site from Onward Way.
- Undertake full site de-risking works, such as remedial earthworks and site infrastructure such as services, roads, and balancing ponds (collecting surface water and releasing into drainage system).

### Business Case Summary

#### Strategic Case

In line with current policy priorities, the scheme supports delivery of Investment Priority 3 “Creating Great Places and Accelerated Infrastructure” of the Combined Authority’s West Yorkshire Investment Strategy, as well as the West Yorkshire Mayor’s pledge to “create 1000 well paid, skilled jobs for young people” and “support local businesses”.

#### Economic Case

A value for money assessment calculates a Benefit Cost Ratio (BCR) of between 2.1 and 2.6, classifying the scheme as high value for money.

#### Commercial Case

Following a review of procurement options, the scheme will progress to a direct Design & Build award.

This will reflect a resumption of the Pre-Construction Service Agreement (PCSA) from the original scheme, with services now required to include a refresh of the supplementary desktop and intrusive surveys and market supply chain evaluation to understand the changes and impact on the project costs and programme since January 2022.

#### Financial Case

The total scheme cost is £12,678,000 of which £11,626,000 will be funded by the Combined Authority's Single Investment Fund (SIF). The remaining balance of £821,160 comprises historical costs which funded the early stages of business case development, of which £417,000 was funded from the Local Growth Deal and £404,160 from the Getting Building Fund.

The Combined Authority scheme is not funding delivery of the commercial units, however as the landowner, the Combined Authority is in the process of developing and finalising its asset development plan, which will explore the best route to full site development, including plot sales and commercial arrangements with prospective developers.

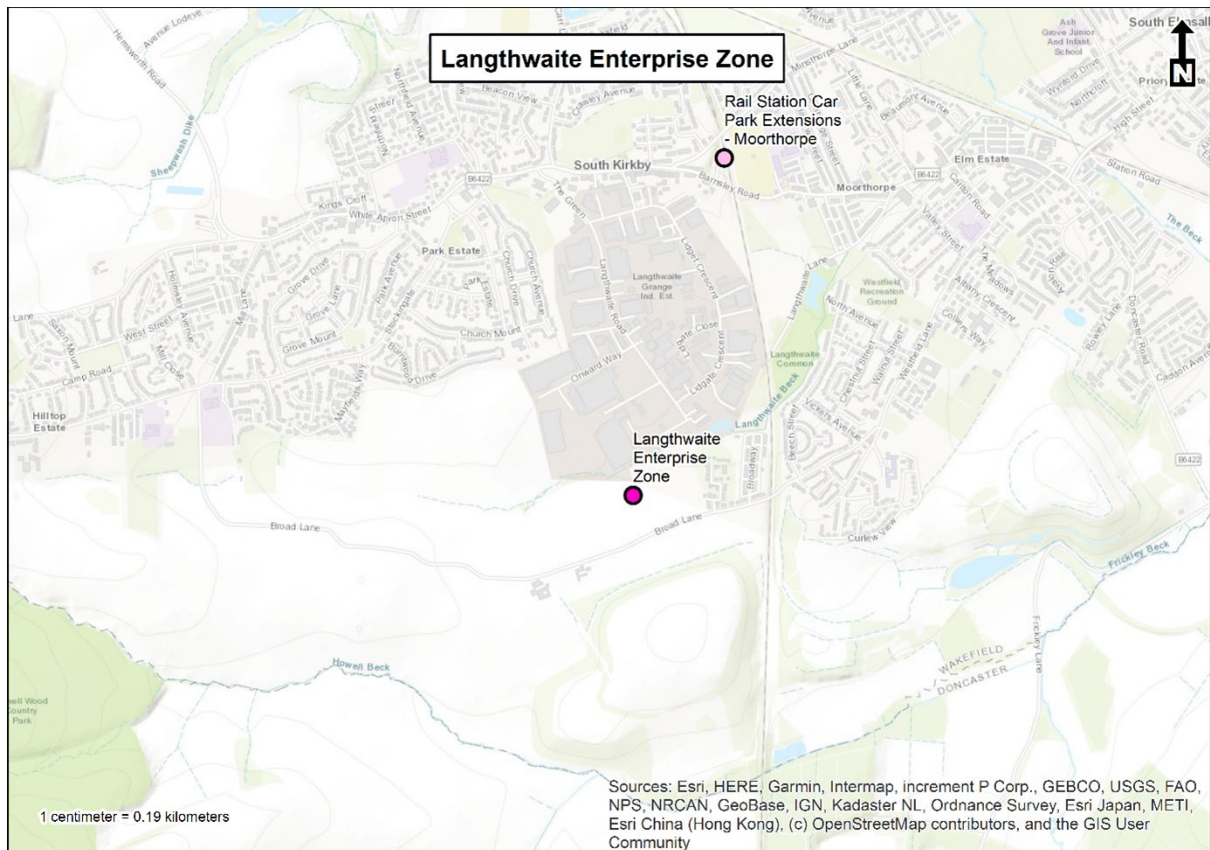
#### Management Case

The Combined Authority is leading the development and delivery of the scheme, establishing a Project Board and working in partnership with Wakefield Council and relevant stakeholders.

The scheme is seeking to secure Planning consent and parcels of land required to deliver the access road by September 2023, to support a start on site in October 2023 with completion of the works by October 2024.

## Location Map

The following map shows the location of the Langthwaite Enterprise Zone Extension Phase 1 scheme.



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

For further information on Combined Authority schemes across the Leeds City Region, please refer to: <https://www.westyorks-ca.gov.uk/growing-theeconomy/leeds-city-region-infrastructure-map>

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Report to: West Yorkshire Combined Authority

Date: 27 July 2023

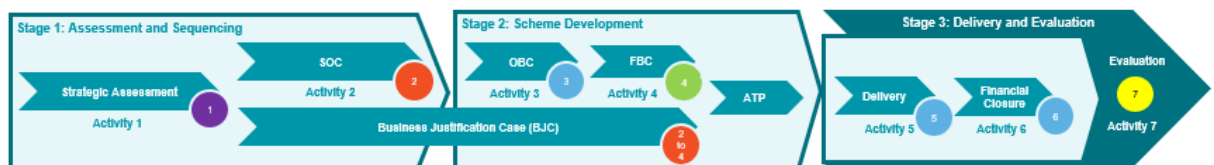
Subject: Project Approvals - Investment Priority 5 – Delivering Sustainable, Inclusive and Affordable Transport

Director: Melanie Corcoran, Director of Transport Policy & Delivery

Author: Craig Taylor, Head of Portfolio Management and Appraisal

## 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, 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, 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 of persistent poverty, 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.

<p><b>Local Electric Vehicle Infrastructure Scheme (LEVI)</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The West Yorkshire LEVI Programme will significantly enhance the number of publicly accessible charge points in the region, specifically targeting 'close to home' charging for residents without access to off street parking.</p> <p>The scheme is to be delivered through the Local Electric Vehicle Infrastructure (LEVI) Fund.</p> <p><b><u>Impact</u></b></p> <p>The scheme is expected to assist in accelerating the uptake of electric vehicles (EVs) by providing charge points in residential locations across West Yorkshire which have no access to off street parking and may not currently be attractive for market led charging provision. This will help to ensure that these areas are not left behind in the transfer to EVs and will support the improvement in areas of poor air quality.</p> <p>The value for money position is currently estimated as being Medium.</p> <p><b><u>Decision sought</u></b></p> <p>The Local Electric Vehicle Infrastructure (LEVI) programme proceeds through decision point 2 (Strategic Outline Case) and work commences on development of the relevant business cases for each individual scheme as detailed in this report.</p> <p>Total value of the scheme - £20,642,000 – £32,642,000</p> <p>Total value of Combined Authority funding - £17,142,000</p> <p>Funding recommendation sought - £1,436,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>CRSTS Highways Asset Management and Enhancement Programme and Off Highway Walking and Cycling Network</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>This programme of schemes will maintain and renew vital highway infrastructure to ensure important transport assets in the region are safe, secure and support active travel, public transport journeys and our local economy and business. The Off Highway Walking and Cycling network schemes will compliment this by working to improve public rights of way across the region. This is the second and third year of a five year programme.</p> <p>The scheme is being delivered through the City Region Sustainable Transport Settlement (CRSTS) Fund.</p> <p><b><u>Impact</u></b></p> <p>These schemes are working to renew and maintain vital highway infrastructure to support safe and reliable journeys for our communities, particularly around economy and business, health, education, and tourism. The scheme will reduce carbon emissions through the promotion of walking, cycling and bus use improvements by maintaining and improving prioritisation at junctions.</p> <p>There is currently no specific benefit cost ratio for this programme.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 (strategic outline case) and decision point 4 (full business case) and work continues on activity 5 (delivery) for the 2023/24 and 2024/25 financial years.</p> <p>Total value of the scheme - £248,000,000 for CRSTS Highways Asset Management and Enhancement programme, £3,440,000 for Off Highway Walking and Cycling network programme and £6,484,800 for the Pothole Fund.</p> <p>Total value of Combined Authority funding - £248,000,000 for CRSTS Highways Asset Management and Enhancement programme, £3,440,000 for Off Highway Walking and Cycling network programme and £6,484,800 for the Pothole Fund.</p> <p>Funding recommendation sought:</p> <ul style="list-style-type: none"> <li>• £35,768,466 for CRSTS Highways Asset Management and Enhancement programme taking total approval for year 2 to £48,168,466.</li> <li>• £516,000 for the CRSTS Off Highway Walking and Cycling network programme taking total approval for year 2 to £688,000.</li> <li>• £6,484,800 of additional funds from the DfT Pothole Fund for delivery of schemes prioritised through the CRSTS Highways Asset Management and Enhancement Programme.</li> </ul> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Safer Roads</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The Safer Roads programme is delivering a wide range of road safety measures contributing to the emerging 'Vision Zero' action plan. Interventions include traffic calming interventions, pedestrian and cycle facilities, speed limit reductions and parking management to improve road safety at targeted locations across the five districts within West Yorkshire. This is the second year of a five year programme</p> <p>The scheme is funded by the City Region Sustainable Transport Settlement (CRSTS) Fund.</p> <p><b><u>Impact</u></b></p> <p>The value for money assessment reflects a benefit cost ratio (BCR) in the region of 5.4:1. This is categorised as Very High value for money.</p> <p>The five-year programme is working to reduce the number of road collisions that are categorised as Killed and Serious Injuries (KSIs), along with road risks that impact productivity, social, public and business costs. The programme is improving accessibility and inclusivity by addressing barriers to use of the transport network and perceptions of safety to encourage a shift from travelling by private car to walking, cycling and public transport. This will also contribute to the decarbonisation of the transport network.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 2 (strategic outline case) and decision point 4 (full business case) and work continues on activity 5 (delivery) for the 2023/24 financial year.</p> <p>Total value of the scheme - £25,000,000</p> <p>Total value of Combined Authority funding - £25,000,000</p> <p>Funding recommendation sought – £4,397,000 of development and delivery costs for quarters 2, 3 and 4 of 2023/24 (year 2) taking the total approval for this scheme to £10,647,000.</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 3 – A660 Otley Road</b></p> <p>Leeds</p>	<p><b><u>Scheme description</u></b></p> <p>The scheme involves provision of a sustainable travel corridor along the A660 Otley Road between St Mark’s Road, close to the University of Leeds, and Shaw Lane, Headingley. The scheme will incorporate a 5km (2.5km on each side) segregated cycle route, junction and traffic signal improvements to facilitate safer cycling, walking and wheeling, bus stop improvements, new public spaces, footway widening and improvements, directional signage and cycle parking.</p> <p>The scheme is to be delivered through the Active Travel Fund.</p> <p><b><u>Impact</u></b></p> <p>The scheme will provide improved sustainable transport options along a key travel corridor in Leeds. The provision of improvements for walking, cycling, wheeling and bus travel are expected to increase the use of sustainable transport options, with a switch from car travel, improved connectivity to education, employment, and housing as well as improving health and wellbeing for users.</p> <p>The scheme has a strong strategic case which is centred on the significant positive benefits expected for people walking, cycling and wheeling and therefore has a very high value for money position when considering the impacts for the intended beneficiaries. When considering impacts for all users the assessment gives a value for money position of poor to very poor, primarily due to the potential delay and rerouting of car traffic.</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 - £10,475,000</p> <p>Total value of Combined Authority funding - £10,475,000</p> <p>Funding recommendation sought - £10,475,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>Zero Emissions Bus Regional Area</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>The Zero Emissions Bus Regional Area (ZEBRA) scheme is part of WYCA's Zero Emission Bus (ZEB) programme which addresses air pollutants from the region's bus fleet by replacing diesel buses with ZEB alternatives.</p> <p>The change request relates to an increase in Zero Emission Buses and associated charging infrastructure funding.</p> <p>The scheme is funded by the Department for Transport's (DfT) ZEBRA programme and bus operator Match funding.</p> <p><b><u>Impact</u></b></p> <p>The scheme's wider social benefits will include health benefits by reducing air pollutants and transport to provide access to training and jobs for low-income communities.</p> <p>The overall scheme is regarded as 'medium' Value for Money (VfM) with a BCR of 1.5</p> <p><b><u>Decision sought</u></b></p> <p>Approval for the Change Request to increase the scope of the Zero Emission Bus Regional Areas (ZEBRA) scheme by an additional 25 double decker zero emission buses (ZEBs) and associated infrastructure to be delivered by partners First Bus Leeds at their Bramley depot.</p> <p>Total value of the scheme - £69,978,646.</p> <p>Total value of Combined Authority funding - £30,309,240.</p> <p>Funding recommendation sought - £5,744,069.</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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- 3.3 Since the Combined Authority’s meeting on 22 June 2023, 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 Transport Committee at its meeting on 7 July 2023. The decisions were made by the Transport Committee following a recommendation from Combined Authority Programme Appraisal Team.
- 3.4 The full agenda and papers for the meeting can be found on the [Combined Authority website here](#).

<p><b>Active Travel Fund Tranche 4 and Capability Fund</b></p>	<p>The Active Travel Fund 4 Programme proceeds through decision point 2 (strategic outline case) and work commences on development of the relevant business case for each individual scheme.</p> <p>Total value of the scheme - £19,961,635</p> <p>Total value of Combined Authority funding - £19,961,635</p> <p>Funding recommendation sought: £6,024,276</p>
<p><b>Dewsbury Cleckheaton Sustainable Travel Corridor</b></p>	<p>The change request to the A638 Dewsbury Cleckheaton Sustainable Travel Corridor scheme to increase the Combined Authority contribution funding to £15,269,915, release £560,200 funding to support business case development and to update the outputs as detailed in this report is approved. The total scheme value will increase from £12,884,315 to £15,799,977.</p> <p>Total value of the scheme - £15,799,977</p> <p>Total value of Combined Authority funding - £15,269,915</p> <p>Funding recommendation sought - £560,200</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

<b>Project Title</b>	<b>Local Electric Vehicle Infrastructure Scheme (LEVI)</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

- 4.3 This scheme will be funded from Local Electric Vehicle Infrastructure (LEVI) fund. The objectives of the LEVI fund are:
- delivering a step-change in the scale of deployment of local, primarily low power, on-street electric vehicle charging infrastructure; and
  - accelerating the commercialisation of, and investment in, the local charging infrastructure sector.
- 4.4 The UK Electric Vehicle Infrastructure Strategy was published in March 2022 setting out the government’s approach to delivering charging infrastructure to 2030, to remove charging infrastructure barriers and accelerate the pace of EV adoption.
- 4.5 To support the delivery of this strategy, the government announced the Local Electric Vehicle Infrastructure Fund (LEVI), a £450 million fund to ‘accelerate commercialisation of local, close to home charging’, which includes both capital funding and resource funding. This funding is provided by the Office for Zero Emission Vehicles (OZEV).
- 4.6 A key aim of the LEVI Fund is to deliver local charge point rollout at scale. Therefore, it is expected that local authorities engage with the private sector to ensure public funding is maximised, investment unlocked, and scale in local rollout is achieved. The fund will also encourage collaborative projects between multiple local authorities.
- 4.7 Schemes will look to ensure equity of access and social value through design and procurement, considering pricing, ease of use, accessibility and working with local communities to ensure charging provision meets local needs.

- 4.8 Following a successful West Yorkshire pilot funding bid, the LEVI Fund Programme will now be delivered by the Combined Authority (CA) and all the West Yorkshire local authority partners.
- 4.9 The Strategic Assessment for the LEVI programme was based on a funding bid for pilot funding to the government's Office of Zero Emission Vehicles (OZEV) for £1,500,000, made in 2022, which was expected to leverage a similar amount of private sector investment. This now constitutes the LEVI pilot project.
- 4.10 The availability of the capability fund then emerged late in the 2022/3 financial year. The amount of capital funding available was also increased substantially, allowing the inclusion in the overall programme of a larger follow-on LEVI capital project after the pilot scheme.
- 4.11 The pilot funding was awarded in February 2023, with the additional capital funding allocated in March 2023.
- 4.12 There are three phases of activity within the programme:
- Phase 1: LEVI Pilot Funding – Grant funding of £1,500,000 has been secured, which will look to leverage private investment to deliver a minimum of 150 charge points across West Yorkshire
  - Phase 2: LEVI Capital Fund – Grant funding of £14,326,00 has been allocated to West Yorkshire to extend the pilot scheme to further accelerate delivery of charge points (subject to OZEV approval of proposal). This will fund between 500 and 1000 charge points.
  - LEVI Capability Fund - Grant funding of £236,880 has been already confirmed plus a further £1,079,120 has been allocated pending OZEV approval. This funding is to provide staff resources in the Combined Authority and all its West Yorkshire local authority partners for the planning and delivery of EV Infrastructure in West Yorkshire
- 4.13 The programme directly contributes to the West Yorkshire mayoral pledges to tackle the climate emergency and protect the environment and create 1,000 well paid, skilled, green jobs for young people.
- 4.14 A summary of the scheme's business case is included in **Appendix 1**.

### **Tackling the Climate Emergency Implications**

- 4.15 The scheme aims to contribute to tackling climate emergency by:
- Supporting the transition to electric vehicles (EVs) through delivering an equitable provision of vehicle charging points.
  - Helping meet carbon reduction targets, a significant increase in the uptake of electric vehicles is required. This programme features the deployment of infrastructure that facilitates the transition to net zero.

- Accelerating the proportion of electric vehicles in West Yorkshire to reduce carbon emissions and support West Yorkshire's response to the Climate Emergency.
- 4.16 A Stage 1 Carbon Impact Assessment (CIA) has been carried out in which the impacts have been assessed qualitatively. The amount of carbon saving per annum has not yet been calculated. The Stage 2 CIA will be carried out as the scheme is developed.
- 4.17 Through the Carbon Impact Assessment the scheme is evaluated to make a long lasting or extensive positive impact in a wide range of categories such as:
- Supporting the shift to low or zero emission vehicles
  - Contributing to the delivery of a low emission transport system that delivers improvements in air quality and reduces carbon emissions
  - Reducing transport emissions in areas of greatest concern such as clean air zones, air quality management areas and noise control areas.
  - The ability to support companies to reduce energy consumption.

### **Outputs and Benefits**

- 4.18 The scheme outputs and benefits include:
- A significant increase in EV charge points across West Yorkshire a minimum of 150 through the pilot study and between 500 – 1,000 for Phase 2.
  - A West Yorkshire EV Infrastructure Framework which can be used in future procurement exercises.
  - Two EV project managers at the CA.
  - A fund for providing EV resourcing for partner councils which could result in up to 10 additional staff.
  - Active travel integration and car club integration (where possible) at charging sites.
  - Strengthening of the electricity supply grid where necessary to facilitate current and future charging needs.
  - Battery storage and renewables at suitable hub locations where needed (e.g. rural locations)
  - Significant carbon reductions and air quality improvements (to be calculated at next stage)
- 4.19 The economic analysis is still at an early stage and a benefit cost ratio (BCR) has not yet been calculated. A detailed economic appraisal will be carried out at the next stage of scheme development. The current assessment of the preferred way forward is that it is expected to offer Medium value for money.

### **Inclusive Growth Implications**



4.20 The scheme inclusive growth implications include:

- The programme supports the Combined Authority's inclusive growth ambitions by ensuring equity of access to EV charging infrastructure, particularly in higher-density housing areas with no access to off-street parking.
- The transition to a net-zero transport network carries the risk that costs, benefits and impacts are distributed unequally across society. Without intervention, engagement with the private sector has shown that the market would be unlikely to deliver the necessary EV charging infrastructure in lower income areas in advance of anticipated demand meaning such areas are at risk of being left behind.
- The programme will ensure equity of access and social value through design and procurement, considering pricing, ease of use, accessibility and working with local communities to ensure infrastructure meets local needs. It will also prepare sites for future demand and accelerate EV adoption to ensure inclusivity in infrastructure delivery.

### **Equality and Diversity Implications**

4.21 An Equality Impact Assessment (EqIA) has been undertaken for the scheme and equality and diversity impacts are being taken account of as part of the development of the business case.

4.22 A vital aim of the programme is to ensure EV infrastructure better supports equality, diversity, and inclusion across the region, ensuring provision is accessible to all and meets local needs.

4.23 One of the programme's aims is equal access to EV charging, levelling up coverage across West Yorkshire and supporting a good customer experience. This includes ensuring that charge point locations and designs are accessible to all and consider a variety of accessibility needs.

4.24 The LEVI Programme ensures that those without home EV charging capabilities are not left behind. Charging point sites will be drawn from across the region but focused on areas of housing areas with higher densities of properties without off-street parking. These areas are diverse but include some of the most deprived areas in West Yorkshire.

### **Risks**

4.25 The scheme risks include:

- A risk of material price increases, fuel/transport price increases and rising inflation impact on infrastructure costs, installation costs and investment offered by the private sector resulting in fewer charge points being installed. This is mitigated by ongoing monitoring of project costs with prioritisation of lower costs sites and technology solutions as required and ongoing market engagement and consultation with investors. The project is scalable to meet the level of investment available.

- A risk of a high proportion of priority sites requiring significant grid reinforcement works or excessive connection costs reducing the overall quantity of charging points. This is mitigated by the production of an initial priority site list which is long enough that overall charge point numbers can be made up from other sites. Second stage of site identification with chosen suppliers means sites that prove to be unviable can be replaced.
- A risk that charge points are not maintained or kept in working order resulting in significant numbers offline, poor service delivery for customers, low usage and reputational damage. This is mitigated by a requirement for suppliers to maintain infrastructure through contracts with tools to claw-back funding if key performance indicators (KPIs) are not met. Suppliers are responsible for operation and maintenance while collecting the majority of profit/revenue, meaning they have a financial incentive to provide quality maintenance.

### Costs

- 4.26 The total programme costs are currently estimated between £20,642,000 and £32,642,000.
- 4.27 The Combined Authority's contribution is £17,142,000 from the LEVI Fund
- 4.28 The following OZEV funding allocations have been made:
- **Phase 1: LEVI Pilot Scheme** - Grant funding of £1,500,000 has been secured.
  - **Phase 2: LEVI Capital Fund** – Grant funding of £14,326,000 allocated to West Yorkshire, subject to OZEV approval of proposal.
  - **LEVI Capability Fund** - Grant funding of £236,880 secured and a further £1,079,120 allocated subject to OZEV approval of proposal.
- 4.29 The remaining funding is £3,500,000 to £15,500,000 from private sector funds. The position on the amount of private sector funding available will become clearer following the procurement of electric charge point operators.
- 4.30 At decision point 1 (strategic assessment) £20,000 of development costs were approved to develop the strategic outline case. A total of £1,436,000 of development funding is now sought to progress the scheme to the next approval stages.
- 4.31 The Combined Authority will need to enter into funding agreements for the Capability Fund with:
- Bradford Metropolitan District Council for expenditure of up to £184,480
  - Calderdale Council for expenditure of up to £195,000
  - Kirklees Council for expenditure of up to £188,631
  - Leeds City Council for expenditure of up to £197,936

- Wakefield Council for expenditure of up to £195,000

## Assurance Pathway and Approval Route

### LEVI Programme

Assurance pathway	Approval route	Forecast approval date
2 (strategic outline case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
7 (evaluation)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer (COO)	02/03/2028

### LEVI Capability Fund

Assurance pathway	Approval route	Forecast approval date
2 (strategic outline case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
Approval to Proceed	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer (COO)	01/09/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer (COO)	29/11/2024

### LEVI Capital Fund Phase 1 Pilot

Assurance pathway	Approval route	Forecast approval date
2 (strategic outline case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023

4 (full business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority Chief Executive Officer (CEO)	01/10/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer (COO)	29/11/2024

## LEVI Capital Fund Phase 2

Assurance pathway	Approval route	Forecast approval date
2 (strategic outline case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
3 (outline business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Transport Committee	01/11/2023
4 (full business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority Chief Executive Officer (CEO)	01/01/2024
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer (COO)	02/01/2028

## Other Key Timescales

- West Yorkshire EV Infrastructure Framework - commence work - July 2023
- Phase 1: Pilot Scheme Procurement start - October 2023
- Phase 1: Pilot Scheme Procurement completion – December 2023
- Phase 2: Capital Scheme Procurement start – March 2024

- Phase 2: Capital Scheme Procurement completion – June 2024

## Assurance Tolerances

Assurance tolerances
Combined Authority costs remain within +10% of those outlined in this report.
Delivery (DP5) timescales remain within 6 months of those outlined in this report.
Outputs: Remain within -10% of those outlined in this report

## Appraisal Summary

- 4.32 There is a strong strategic case for this scheme which can be seen to be directly addressing policy and strategy at local, regional and national level. The programme can be seen to be addressing a key risk that areas of dense housing without access to off street parking could be left behind in the transition to Electric Vehicles (EVs). On this basis, it could be argued that the strategic case is the most important consideration in the business case.
- 4.33 The scheme is well aligned with Climate Change priorities in that it will facilitate the increased uptake of electric vehicles which is needed to meet carbon reduction targets. It also aligns well with Inclusive Growth ambitions by ensuring equity of access to EV charging infrastructure, particularly in areas with higher-density housing areas with no access to off-street parking.
- 4.34 The scheme will ensure equity of access and social value through design and procurement, considering pricing, ease of use, accessibility and working with local communities to ensure infrastructure meets local needs. It will also prepare sites for future demand and accelerate EV adoption to ensure inclusivity in infrastructure delivery.
- 4.35 The value for money (VfM) has not been calculated at this stage, but the promoter has provided a justified assessment of the VfM position for each of the shortlisted options. The expected VfM category for all of the shortlisted options is stated to be Medium (ie having a benefit cost ratio of higher than 1.5:1 and less than 2:1).
- 4.36 Public consultation has not yet been carried out, but a consultation, engagement and communication strategy will be developed as part of the programme. It will include community and wider stakeholder engagement, which will include community engagement undertaken by the supplier to determine potential sites and optimise solutions to meet local conditions.
- 4.37 Overall, the submission provides sufficient assurance to recommend approval of the programme SOC and approval be given to:
- Commence work on the outline business case (OBC) on the Phase 2 Capital Fund project
  - Commence work on the full business case (FBC) for the Phase 1 Pilot Project
  - Commence work on Delivery for the Capability Fund project.

## Recommendations

4.38 The Combined Authority approves that:

- (i) The Local Electric Vehicle Infrastructure (LEVI) Programme proceeds through decision point 2 (strategic outline case) and work commences on individual project business cases as outlined in this report
- (ii) An indicative approval to the Combined Authority's contribution of £17,142,000. The total programme value is between £20,642,000 and £32,642,000, dependent on leveraged private sector contributions.
- (iii) Subject to the conditions set by the Programme Appraisal Team, approval to funding of £1,316,000 to progress the Local Electric Vehicle Infrastructure (LEVI) Capability Fund scheme to Activity 5 (Delivery). The total scheme costs are £1,316,000.
- (iv) Indicative approval to funding of £1,500,000 for the Local Electric Vehicle Infrastructure (LEVI) Phase 1 Pilot scheme is given and work commences on Activity 4 (full business case). The total scheme costs are £3,000,000.
- (v) Indicative approval to funding of £14,326,000 for the Local Electric Vehicle Infrastructure (LEVI) Phase 2 scheme is given and work commences on Activity 3 (outline business case). The total scheme costs are £16,326,000.
- (vi) The following development costs are approved:
  - £354,953 for the Combined Authority for the LEVI Capability scheme
  - £ 961,047 for the five West Yorkshire partner local authorities for the LEVI Capability scheme
  - £120,000 for the Combined Authority for the Phase 1 LEVI Pilot scheme and the Phase 2 LEVI scheme
- (vii) The Combined Authority enters into a funding agreement for the amounts set out below with each of the five partner councils for the capability fund:
  - City of Bradford Metropolitan District Council for expenditure of up to £184,480.
  - Calderdale Council for expenditure of up to £195,000.
  - Kirklees Council for expenditure of up to £188,631.
  - Leeds City Council for expenditure of up to £197,936.
  - Wakefield Council for expenditure of up to £195,000.
- (viii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the transport committee. This will be subject to the scheme remaining within the tolerances outlined in this report.



## Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>CRSTS Highways Asset Management and Enhancement Programme and Off Highway Walking and Cycling Network</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 (strategic outline 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

- 4.39 The Highways Asset Management and Enhancement Programme and Off Highway Walking and Cycling Network programme is being funded from the City Region Sustainable Transport Settlement (CRSTS) Fund. The £830,000,000 CRSTS fund was awarded to the Combined Authority on 1 April 2022. 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.
- 4.40 This programme is overseeing the investment of core funding to manage the highways assets in West Yorkshire to ensure we have safe and well-maintained roads, footpaths and public rights of way (off highway walking and cycling). This will include proportionate enhancements to improve facilities that promote access and encourage more active and sustainable forms of travel. Examples of this will include the installation of drop kerbs when pavement surfaces are being renewed and improved prioritisation for buses and cyclists at junctions where traffic signal replacement and other renewals are due.
- 4.41 The programme consists of a prioritised list of schemes for completion that will be scheduled annually. Each local authority has a rolling programme of inspection for each category of highways assets, including bridges, road surfaces and pavements, which assesses the quality and risks associated with their current state. Based on the outcome of these inspections, assessment of accident statistics and the third-party claims connected to each asset, the local



authority are prioritising works for that year to fulfil its legal responsibility to operate a safe network. In addition, where works are undertaken, each local authority is working to fulfil objectives to improve access and safety for all, bus prioritisation at junctions and moving towards the government's design guidance for cycling infrastructure LTN1/20. The programme for each year is being overseen by Highways Alliance Highways Infrastructure Asset Management (HIAM) board. Each local authority has a lead officer overseeing the programme in their area and facilitating approval by the local authority cabinet. In autumn 2022, the government announced funding from the Department for Transport's Pothole Fund. The Pothole Fund programme is awarded to local authorities to complete targeted patching works to extend asset life and provide immediate repairs to assure the safety of road users e.g., cyclists. The Pothole fund is a separate award of additional funding that will be used in conjunction with the City Region Transport Settlement programme, because of its closely related aims. The West Yorkshire award of £6,848,800 will increase the number of prioritised interventions that can be delivered.

- 4.42 This programme is allowing flexibility for short term adjustments to the schemes where extreme weather or other external factors increase the priority of a scheme or make emergency repairs unavoidable. The process of reviewing all the factors in determining the priority list of schemes is refreshed annually. To enable this flexibility funding will continue to be sought at regular intervals for the 5-year duration of the programme.
- 4.43 The distribution of the funding awarded between the partner councils for this year has again been agreed by the Yorkshire Highways Alliance Highways Infrastructure Asset Management Board. The distribution is based on the on the current network length recorded with the Department for Transport (DfT). The same method of distribution will be used to allocate the DfT Pothole Fund award for 2023.
- 4.44 This strategic outline case seeks the balance of funding for year 2, the 2023/24 financial year. Funding for quarter 1 was previously approved by the Combined Authority at its meeting on 2 February 2023. In addition, the Combined Authority is asked to approve the funding for year 3, the financial year 2024/25. This approval is subject to the discharge of the conditions set by the Programme Appraisal Team (PAT) and will be confirmed and signed off by the Combined Authority's Chief Executive in the final quarter of year 2 (the financial year 2023/24).
- 4.45 The year 2 and 3 strategic outline case has been further developed in accordance with the conditions set during the approval of the Year 1 strategic outline case. The improvement of this programme is expected to continue through delivery of year 2, and the meeting of the conditions required for the release of year 3 funding year as the partner councils increasingly integrate their approaches.
- 4.46 A summary of the scheme's business case is included in **Appendix 2**.

### **Tackling the Climate Emergency Implications**

- 4.47 The scheme tackling climate emergency implications are:

- Reducing pollution through an effective well prioritised maintenance programme which minimises the disbenefits of potholes and uneven end of life surfacing. Poor surfaces increase carbon emissions by around 4% compared to well-maintained roads.
- Promoting a move from cars to walking and cycling through targeted enhancements for cyclists, pedestrians, and buses.

4.48 The programme has completed a carbon impact assessment which highlights that there are no negative impacts to the environment expected from this programme, with beneficial impacts expected on air quality, greenhouse gasses, and noise. A new standardised method to compare the carbon impact of different surface treatments will be used in the programme as part of future carbon monitoring.

### Outputs and Benefits

4.49 The scheme outputs and benefits include:

Output	Number
Carriageway improvements	970
Footway improvements	245
Highway drainage improvements	57
Structures improvements	70
Street furniture improvements	75
Off Highway Walking and Cycling improvements	155
Street lighting improvements (non-PFI)	16

4.50 The scheme benefits include:

- Reduction in claims for road user compensation on new surfacing.
- Reduction in long-term maintenance costs.
- Reduction in health costs due to improved health from more active travel journeys.
- Journey time savings including for buses that are reprioritised.
- Improved safety and perceptions of safety for women and girls as confirmed by surveys.
- Business productivity benefits (non-cash releasing).
- Improved journey quality for all road users, due to improved surfacing and reduced frustration at roadworks.
- Community pride from a well maintained, clean and attractive public realm, highway network and Off Highway Walking and Cycling network.

### Inclusive Growth Implications

4.51 The scheme inclusive growth implications include:

- Priority for the provision of improved active travel infrastructure and bus prioritisation will be given to areas that experience lower incomes and inequalities, to increase the transport options to those less likely to have access to a private car.
- Where there is a need to engage contractors to carry out work for this programme, the process to select and award contracts for work in this programme actively evaluate e social value gains and, and selection criteria typically includes a 10% weighting in the tender evaluation process on this contribution.
- Including social value commitments in all contracts that are legally binding and actively monitored.

### **Equality and Diversity Implications**

4.52 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.

### **Risks**

4.53 The scheme risks include:

- Cost rises due to inflation will be kept under continual review and if necessary, fewer schemes will be delivered if cost negotiations with contractors can't decrease costs enough. Inflation monitoring has been implemented.
- Insufficient staff availability in the companies engaged to deliver the work leading to delays. A full review of resources internally and available through external suppliers for delivery of the 2023/24 programme has been completed and has confirmed there are sufficient resource in place. This will be repeated for year 3 of the programme.
- Unexpected emergency repairs that need to be carried out instead of planned schemes. This will be managed if needed by reprioritisation of the planned programme to repair the damaged asset. Plans for winter maintenance and flood risk management by each partner council will assist with reducing this risk.

### **Costs**

4.54 The scheme costs are:

- The total scheme costs for the five-year Highways Asset Management and Enhancement programme are £248,000,000 with a further £3,440,000 for CRSTS Off Highway Walking and Cycling network programme. Both will be completely funded by the Combined Authority's CRSTS fund.

- Funding to be approved for quarter 2, 3 and 4 for the financial year 2023/24 (year 2) of £35,768,466 for CRSTS Highways Asset Management and Enhancement programme, following approval of quarter 1 spend by the Combined Authority on 02 February 2023. This scheme has previously received full approval for £62,000,000 and brings the total approval for this scheme to £97,768,466 for year 1 and 2.
- Funding also to be approved for quarter 2, 3 and 4 for the financial year 2023/24 (year 2) of £516,000 for the CRSTS Off Highway Walking and Cycling network programme following approval of quarter 1 spend by the Combined Authority on 02 February 2023. This scheme has previously received full approval for £860,800 and brings the total approval for this scheme to £1,376,800.
- Funding is also sought to cover year 3 (financial year 2024/25) of £52,736,931 for CRSTS Highways Asset Management and Enhancement programme, which will bring the total approvals to £150,505,397 for years 1 to 3. In addition, £688,000 is sought for year 3 of the CRSTS Off Highway Walking and Cycling network programme. This will bring the total approvals for years 1 to 3 to £2,064,800. The total for both schemes will be £152,570,197.
- Approval is sought for funding from the Pothole fund of £6,484,800 awarded by the Department for Transport for 2023/24.
- Funding for year 1 of these programmes was previously approved (the financial year 2022/2023) by the Combined Authority at its meeting on 17 March 2022.
- The Combined Authority confirmed on 17 March 2022 as part of the approval pathway for this CRSTS programme that any development costs to develop the strategic outline cases would come from within the £248,000,000 allocation.
- The Combined Authority will enter into addendums to the existing funding agreements with partner councils for the financial year 2023/24 (year 2) expenditure of up to £35,768,466, and £516,000 for Off Highway Walking and Cycling from the CRSTS Fund. For the Pothole funding for the financial year 2023/24 the Combined Authority will enter into a separate funding agreement with each partner council for their share of £6,484,800 as detailed in the tables below:

<b>Programme: Asset Management and Enhancements</b>	<b>Total 5 Years Funding</b>	<b>Total approved to the end of year 2 (financial year 2023/24)</b>	<b>Total approved to the end of year 3 (financial year 2024/25)</b>
Bradford	£51,187,200	£5,626,000	£12,168,000
Calderdale	£30,504,000	£4,464,000	£5,952,000
Kirklees	£49,848,000	£7,402,800	£9,870,400
Leeds	£77,078,400	£12,249,266	£16,711,331
Wakefield	£39,382,400	£6,026,400	£8,035,200
<b>Total</b>	<b>£248,000,000</b>	<b>£35,768,466</b>	<b>£52,736,931</b>

Programme: <b>Off Road cycling and walking/PROW</b>	<b>Total 5 Years Funding</b>	<b>Total approved to the end of ear 2 (financial year 2023/24)</b>	<b>Total approved to the end of year 3 (financial year 2024/25)</b>
Bradford	£712,080	£106,812	£142,416
Calderdale	£959,760	£143,964	£191,952
Kirklees	£780,880	£117,132	£156,176
Leeds	£608,880	£91,332	£121,776
Wakefield	£378,400	£56,760	£75,680
<b>Total</b>	<b>£3,440,000</b>	<b>£516,000</b>	<b>£688,000</b>
<b>DfT 2023 Pothole Fund</b>	<b>2023 Award</b>	<b>Current Funding request</b>	-
Bradford		1,329,384	-
Calderdale		778,176	-
Kirklees		1,290,475	-
Leeds		2,036,227	-
Wakefield		1,050,538	-
<b>Total</b>	<b>£6,484,800</b>	<b>£6,484,800</b>	-

### Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
2 to 4 (strategic outline case) <b>Year 2 (2023/24)</b> <b>Year 3 (2024/25)</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
Approval to Proceed <b>Year 3 (2024/25)</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Chief Executive	28/02/2024
2 to 4 (strategic outline case) <b>Year 4 and 5 (2025/26 and 2026/27)</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Transport Committee	31 March 2025 (indicative)
5 (delivery) <b>Year 1 to 5</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	30/06/2027

### Assurance Tolerances

Assurance tolerances
Cost: Combined Authority costs remain within +5% of those outlined in this report

## Appraisal Summary

- 4.55 The programme will provide essential maintenance with logical and proportionate improvements to the highway infrastructure as funding allows, to fulfil the legal responsibility of the five local authority partners in West Yorkshire to prevent deterioration and hazards developing roads, pavements and public rights of way network. It will pave the way for renewed economic growth coming out of the current recession, contribute to levelling up and support a policy of modal shift to active travel and public transport. The additional in year funding from the Pothole Fund will extend the interventions beyond what CRSTS alone could deliver, but these schemes will have been prioritised using the CRSTS programme methodology.
- 4.56 The individual approval pathway for the programme means that regular appraisal submissions will come forward to summarise the progress made to date and to obtain approval for future spending. The next submission will be an approval to proceed for 2023/4 to provide a progress update, and full detail on how the programme monitoring and evaluation will be managed and how the economic gains the programme enables will be assessed.

## Recommendations

- 4.57 The Combined Authority approves that:
- (i) The CRSTS Highways Asset Management and Enhancement Programme for the 2023/24 financial year (year 2) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2023/24, and work commences on the strategic outline case for future years.
  - (ii) The CRSTS Off Highway Walking and Cycling Network Programme for the 2023/24 financial year (year 2) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2023/24, and work commences on the strategic outline case for future years.
  - (iii) The Department for Transport's Pothole Fund proceeds through decision point 2 to 4 (strategic outline case) and into delivery.
  - (iv) An indicative approval is given to the total £248,000,000 for CRSTS Highways Asset Management and Enhancement programme and £3,440,000 for the Off Highway Walking and Cycling network programme.
  - (v) Approval to an additional £35,768,466 of development and delivery costs for quarters 2, 3 and 4 of the CRSTS Highways Asset Management and Enhancement programme (year 2) is given to provide a total allocation of £48,168,466 for the 2023/24 financial year.
  - (vi) Approval to an additional £516,000 of development and delivery costs for quarters 2,3 and 4 of the CRSTS Off Highway Walking and Cycling

network programme (year 2) is given to provide a total allocation of £688,000 for the 2023/24 financial year.

- (vii) Approval to the £6,484,800 additional funding awarded from the Department for Transport's Pothole Fund to fund interventions to maintain the highway network prioritised through the CRSTS programme.
- (viii) The Combined Authority enters into addendums to the existing funding agreement(s) with partner councils for expenditure of the apportioned £35,768,466 for CRSTS Highways Asset Management and Enhancement programme (year 2), £516,000 for the CRSTS Off Highway Walking and Cycling Network programme (year 2) for the 2023/24 financial year, and £6,484,800 for the Pothole Fund up to the amounts below:
  - Expenditure of up to £20,297,416 with Bradford Council
  - Expenditure of up to £13,810,080 with Calderdale Council
  - Expenditure of up to £21,839,627 with Kirklees Council
  - Expenditure of up to £33,203,445 with Leeds Council
  - Expenditure of up to £16,478,698 with Wakefield Council
- (ix) Delegations to the Director of Transport Policy and Delivery to amend allocated funding amounts released as part of this decision as required.
- (x) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

4.58 The Combined Authority approves that subject to the conditions set by the Programme Appraisal Team that:

- (i) The CRSTS Highways Asset Management and Enhancement Programme for the 2024/25 financial year (year 3) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2024/25.
- (ii) The CRSTS Off Highway Walking and Cycling Network Programme for the 2024/25 financial year (year 3) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2024/25.
- (iii) Approval to an additional £52,736,931 for development and delivery costs for the CRSTS Asset Management and Enhancement programme (year 3) is given to provide a total allocation of £52,736,931 for the 2024/25 financial year.
- (iv) Approval to an additional £688,000 for development and delivery costs for the CRSTS Off Highway Walking and Cycling network programme

(year 3) is given to provide a total allocation of £688,000 for the 2024/25 financial year.

- (v) The Combined Authority enters into addendums to the existing funding agreement(s) with partner councils for expenditure of the apportioned £52,736,931 for CRSTS Asset Management and Enhancement programme (year 3) and £688,000 for CRSTS Off Highway Walking and Cycling Network programme for the 2024/25 financial year (year 3), up to the amounts below:
- Expenditure of up to £32,607,832 with Bradford Council
  - Expenditure of up to £19,954,032 with Calderdale Council
  - Expenditure of up to £31,866,203 with Kirklees Council
  - Expenditure of up to £50,036,552 with Leeds Council
  - Expenditure of up to £24,589,578 with Wakefield Council
- (vi) Delegations to the Director of Transport Policy and Delivery to amend allocated funding amounts released as part of this decision as required.
- (vii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.



<b>Project Title</b>	<b>CRSTS Safer Roads</b>
<b>Stage</b>	2 (scheme development)
<b>Decision Point</b>	2 (strategic outline 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

- 4.59 The Safer Roads programme is being funded from the City Region Sustainable Transport Settlement Fund (CRSTS). The £830,000,000 CRSTS fund was awarded to the Combined Authority on 1 April 2022. CRSTS aims to deliver schemes that 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 sustainable transport becomes an attractive and truly viable alternative to the car.
- 4.60 In terms of road safety in West Yorkshire, it is reported that in 2021, 47 road users were killed in West Yorkshire; almost half of those were pedestrians or cyclists. Over 5,000 people were injured with 1,000 of these seriously injured. It is estimated that the cost to society of road collisions in West Yorkshire in 2021, was in the region of £441m.
- 4.61 The ultimate aim of the CRSTS Safer Roads Programme is to improve road safety through the reduction of the number of road collisions that are categorised as Killed and Serious Injuries (KSI).
- 4.62 The Safer Roads Programme is working to contribute to the emerging 'Vision Zero' action plan which sets an aspirational target of a 'zero tolerance' of transport related deaths and serious injury collisions. This will be achieved by adopting a 'safe systems' approach that focuses on providing safe speeds, safe roads, safe vehicles, safe road users and post-collision response. A wide range of measures are proposed to deliver this, including traffic calming, pedestrian and cycle facilities, speed limit reductions and parking management. The programme is also working to boost accessibility by addressing barriers to accessing the transport network with regard to real and perceived issues relating to safety; it is considered this will then encourage people to travel by more sustainable transport modes such as walking, cycling

and public transport which will help contribute to the decarbonisation of the transport network.

4.63 The programme objectives include:

- Reducing the number and severity of traffic collisions
- Increase speed limit compliance on national roads to create a safer environment for road users
- Increase speed limit compliance on local roads to create a safer environment for road users
- Encouraging a move from cars to walking and cycling

4.64 The CRSTS funding is enabling each district partner to deliver a programme of road safety measures that aim to improve road safety through the reductions of KSIs and road risks.

4.65 Year 1 of the programme covered the 2022/23 financial year and a total of £5m of development and delivery funding was approved in February 2023. To date, £2,640,719 has been spent on the Year 1 programme; this represents around 50% of the funding approval. However, in terms of scheme outputs, 153 of the planned 221 schemes were delivered which represents around 70% of the total planned. The remaining schemes are to be delivered in Year 2 of the programme. A summary of the types and numbers of schemes delivered is listed below, together with the percentage complete of what was planned at the start of the year.

Type of scheme	Number planned	Number Delivered (% of total planned)
Traffic calming schemes	22	12 (55%)
Junction improvement works	10	3 (30%)
Traffic management schemes	25	8 (32%)
Pedestrian crossings	18	14 (78%)
Speed enforcement camera	1	4 (400%)
Average speed cameras	27	0 (0%)
Traffic regulation orders	77	83 (108%)
Speed management schemes	8	4 (50%)
Cycle infrastructure schemes	4	0 (0%)
20mph limits/zones	3	1 (33%)
Accessibility works	26	24 (92%)
<b>Total</b>	<b>221</b>	<b>153 (69%)</b>

4.66 The Year 2 SOC has been further developed following the recommendations made as part of the approval of the Year 1 SOC. However, the programme is continuing to develop over the five year period and further improvements are

to be made to the next strategic outline case submission, taking account of the conditions set by the Project Appraisal Team.

4.67 A summary of the scheme's business case is included in **Appendix 3**.

### **Tackling the Climate Emergency Implications**

4.68 The scheme is working to contribute to tackling the climate emergency by creating safer roads which encourage people to travel by more sustainable transport modes such as walking, cycling and public transport, rather than by the private car. By providing easy access to sustainable alternatives to private vehicles this scheme will contribute to the reduction carbon emissions in the region.

4.69 The Combined Authority's carbon impact assessment tool has been completed as part of the business case submission. The assessment highlighted that there are no negative impacts to the environment expected from this programme, with slight beneficial impacts expected towards air quality, greenhouse gasses, and noise.

### **Outputs and Benefits**

4.70 The scheme outputs and benefits for (Year 2) include:

- 16 traffic calming schemes
- 14 junction improvement works
- 10 traffic management schemes
- 21 pedestrian crossings
- 12 speed enforcement cameras
- 8 average speed cameras
- 131 Traffic Regulation Orders
- 31 speed management schemes
- 5 cycle infrastructure schemes
- 9 20mph limits/zones
- 12 accessibility works
- Benefits to society from a reduction in casualties (e.g. reductions in grief, loss of earnings, healthcare costs)
- Road user delay benefits from a reduction in disruption due to collisions
- Health benefits from an increase in active travel (e.g. reduced absenteeism, reductions in healthcare costs)
- Environmental benefits (e.g. noise, air quality, greenhouse gases) from a modal shift from car to active travel
- Improved journey quality for all road users, due to improved feelings of safety

- Improved access to employment and education, reducing severance and improving social inclusion.

### **Inclusive Growth Implications**

4.71 The scheme's inclusive growth implications include:

- Improving safety on the transport network and seeking to reduce the number of collisions which disproportionately impact more vulnerable members of society. This includes pedestrians, cyclists, children, older people and those living in areas identified as having high levels of deprivation (as recorded by the Governments Indices of Multiple Deprivation).
- Implementing improvements in locations along key public transport routes and in areas with high proportions of residents with relatively low incomes. This will facilitate a better connected and safer transport network that will encourage use of walking, cycling, and public transport enabling those without access to a car to travel safely and efficiently to places where employment, education, and leisure opportunities are available.

### **Equality and Diversity Implications**

4.72 An Equality Impact Assessment (EqIA) has been undertaken for the scheme. Equality and diversity impacts were taken account of as part of the development of the scheme and the business case development. It was concluded that no groups in society will be negatively impacted by the programme and associated projects. It is highlighted that introducing and improving engineering measures such as traffic calming, pedestrian and cycle facilities, and speed management initiatives will allow all users to use and cross the road safely and comfortably, particularly the young, elderly, and disabled who are more vulnerable to road traffic collisions. As such, the safety benefits that will result from the proposed improvements would reduce the unequal impact in terms of road safety that these more vulnerable groups experience.

### **Risks**

4.73 The scheme risks include:

- Schemes' failing to comply with latest walking and cycling infrastructure guidance. This will be mitigated by ensuring the latest guidance is considered when designing the schemes.
- Proposals may involve removing existing parking provision resulting in objections to the scheme. This will be mitigated by incorporating early engagement as schemes are being designed to ensure 'buy-in' and political support for the proposals.
- Initial increase in collisions following delivery of scheme. This will be mitigated by ensuring Road Safety Audits are undertaken together with monitoring and evaluation of the schemes to understand the scheme's performance and enable lessons to be learned and taken into account.

- High rates of inflation impacting scheme costs. It is proposed that this will be mitigated by delivering fewer schemes or delaying delivery of certain schemes if construction inflation is to change going forward. Schemes will need to be prioritised to ensure the key locations are improved first.
- Increases in maintenance costs as a result of introducing new schemes. This is proposed to be mitigated by ensuring designs are simplified as much as possible and avoid using materials which require more frequent maintenance.

## Costs

4.74 The scheme costs are:

- The total scheme cost for the five-year Safer Roads Programme is £25,000,000, which is being completely funded from the Combined Authority's CRSTS fund.
- Funding to be approved for quarters 2, 3 and 4 for the financial year 2023/24 (year 2) of £4,397,000. The scheme has previously received full approval for £5,647,000 and brings the total approval for this scheme to £10,647,000 for year 1 and 2.
- This strategic outline case is for spending approval for quarters 2, 3 and 4 spend for this financial year (year 2, 2023/24), following approval of quarter 1 spend by the Combined Authority on 02 February 2023.
- Funding for year 1 of this programme was previously approved (the financial year 2022/2023) by the Combined Authority at its meeting on 17 March 2022.
- The Combined Authority confirmed on 17 March 2022 as part of the approval pathway for this CRSTS programme that any development costs to develop the strategic outline cases would come from within the £248,000,000 allocation.
- The Combined Authority will enter into addendums to the existing funding agreements with the five partner councils of the apportioned £5,647,000 for 2023/24 financial year taking up to the amounts shown below:
  - City of Bradford Metropolitan District Council- £1,155,000
  - Calderdale Council - £440,000
  - Kirklees Council - £925,000
  - Leeds City Council - £2,377,000
  - Wakefield Council - £750,000

## Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
2 to 4 (strategic outline case) <b>Year 1 (2022/23)</b>	Recommendation: Combined Authority's Programme Appraisal Team	02/02/2023

	Decision: Combined Authority	
2 to 4 (strategic outline case) <b>Year 2 (2023/24)</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
2 to 4 (strategic outline case) <b>Year 3 to 5 (24/25, 25.26. 26.27)</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Transport Committee	To be determined
5 (delivery) <b>Year 1 to 5</b>	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	30/06/2027

### Assurance Tolerances

<b>Assurance tolerances</b>
Cost: Combined Authority costs remain within +10% of those outlined in this report Programme: Delivery (DP5) timescales remain within 3 months of those outlined in this report. Outputs: Remain within -10% of those outlined in this report.

### Appraisal Summary

- 4.75 The scheme aims to support inclusivity, accessibility and to help tackle the climate emergency, through delivery of schemes that improve safety on the transport network in West Yorkshire. The schemes will reduce the number of people killed or seriously injured, in particular for those walking or cycling.
- 4.76 The business case highlights the ability for the schemes to provide very high value for money. It is estimated that the costs resulting from road collisions in West Yorkshire, in 2021, was around £441,000,000 and the £25,000,000 programme will make a significant impact in reducing that figure. Future business case submissions will take account of the recommendations made in the appraisal of this business case submission. This will include providing further evidence and detail as to how the benefits will be realised and how the schemes are prioritised to ensure the programme provides the optimal level of benefits. Future business case submissions for this programme will also set out how the schemes will be monitored to enable understanding of how well the schemes are performing to help ensure future schemes can tackle road safety issues effectively.

### Recommendations

- 4.77 The Combined Authority approves that:

- (i) The CRSTS Safer Roads Programme proceeds through Decision Point 2 and 4, and delivery continues until the end of 2023/24, and work commences on the development of the strategic outline case for Year 3.
- (ii) An indicative approval to the total CRSTS Safer Roads programme value of £25,000,000 is given.
- (iii) Approval to an additional £4,397,000 of development and delivery costs for quarters 2, 3 and 4 for the CRSTS Safer Roads programme (Year 2) is given to provide a total allocation of £5,647,000 for the 2023/24 financial year. The total allocation up to the end of Year 2 is £10,647,000.
- (iv) The Combined Authority enters into addendums to the existing funding agreements with the five partner councils for expenditure of the apportioned £5,647,000 for the 2023/24 financial year, up to the amounts shown below:
  - City of Bradford Metropolitan District Council for expenditure of up to £1,155,000
  - Calderdale Council for expenditure of up to £440,000
  - Kirklees Council for expenditure of up to £925,000
  - Leeds City Council for expenditure of up to £2,377,000
  - Wakefield Council for expenditure of up to £750,000
- (v) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

<b>Project Title</b>	<b>Active Travel Fund 3 - A660 Otley Road</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

- 4.78 This scheme will be funded from the Active Travel Fund.
- 4.79 On 9 May 2020 the Department for Transport (DfT) announced a new £250 million emergency active travel fund - the first stage of a £2 billion investment over the subsequent five years, for cycling, walking and wheeling in England. A further announcement confirmed that £225 million of this funding would be allocated to local authorities to reallocate road space to support safe cycling, walking and wheeling and to help make sure the road, bus and rail networks are ready to respond to future increases in demand.
- 4.80 Across tranches 1 and 2 of the Active Travel Fund, West Yorkshire secured £12,566,000 to fund highways infrastructure schemes, behaviour change measures and both temporary and permanent cycling, walking and wheeling infrastructure improvements.
- 4.81 Active Travel Capital Programme Tranche 3 funding and schemes were approved by the Combined Authority on 22 October 2021. This programme aimed to deliver similar permanent schemes, this time targeted at enabling modal shift from short car journeys and in areas of significant deprivation.
- 4.82 In March 2022, the DfT allocated a total of £6,735,000 capital funding from tranche 3 of its Active Travel Fund to five schemes in West Yorkshire this included the following:
- Leeds - A660 Otley Road: £4,785,000
  - Bradford - Active Travel Neighbourhoods: £525,000
  - Calderdale - Active Travel Neighbourhoods: £475,000
  - West Yorkshire - School Streets Programme: £350,000



- Bradford - Darley Street (Bradford City Centre): £600,000
- 4.83 The A660 scheme, in Leeds, seeks to build upon the success of the temporary interventions installed on the A660, as part of the Emergency Active Travel Fund (Tranche 1). The proposal is to further improve on the existing temporary provision by upgrading it to a fully segregated cycle route as well as adding further improvements to the corridor including footway widening, pedestrian crossings, public space enhancements, bus stop and junction improvements. The package of improvements proposed is anticipated to ensure bus users are not adversely impacted by the scheme by enabling bus priority at traffic signals to avoid impacts to bus journey times and reliability.
- 4.84 As part of scheme development, a change request was submitted to Active Travel England (ATE), seeking an additional £5,690,000 to fund a higher quality scheme, along the A660, that would include major improvements at five signalised junctions, major changes to incorporate segregated facilities outside the Arndale Centre, placemaking at several locations along the corridor and more road crossings. These changes were proposed to resolve a number of issues in the scheme design identified by ATE and account for inflationary cost increases. The change request was approved by ATE on 22 March 2023.
- 4.85 It is anticipated that the improved scheme will convert short vehicle journeys to cycling, walking and wheeling trips. This can facilitate more reliable journey times along the corridor, provide safety benefits, reduced severance and improve journey quality and ambience for pedestrians and cyclists. In particular this scheme supports and connects other cycle and pedestrian projects and developments along the corridor including Woodhouse Lane Gateway, Shaw Lane junction improvements and proposals to improve the operation of the Lawnswood roundabout.
- 4.86 The scheme objectives include:
- Increase the number of cycle trips on the scheme routes by 60% hence contributing to the Connecting Leeds strategy target to increase cycling trips by 400% by 2030
  - Increase the number of walking trips by 25% contributing to the Connecting Leeds strategy to increase walking trips by 33% by 2030
  - Have zero KSI's over a five-year period after scheme completion
  - Halve the total number of collisions from 155 to 77 by 2029
  - Increase the Healthy Street Score in the scheme area by 2025
  - Improve access to employment, skills and education, to achieve 70%+ modal share of sustainable transport in accessing schools and colleges
- 4.87 A summary of the scheme's business case and location map is included in **Appendix 4**.

## **Tackling the Climate Emergency Implications**

- 4.88 The scheme aims to contribute to tackling the climate emergency by creating improved provision for sustainable transport options for residents, students, workers and visitors in Leeds. The proposals are anticipated to facilitate a switch from relatively short car trips to cycling, walking and wheeling trips as well as encourage use of public transport to help reduce carbon emissions from those users along the A660 corridor.
- 4.89 A carbon impact assessment of the scheme has been undertaken which calculated total carbon emissions of 1,558 tCO<sub>2</sub>e over the appraisal period. This indicates that, although there may be carbon savings due to some travel shifting from motor traffic to cycling, walking and wheeling, the carbon emissions resulting from construction activities and materials (due to the significant length of the route), together with some possible rerouting of motor traffic is forecast to result in a net increase in carbon emissions.

### **Outputs and Benefits**

- 4.90 The scheme outputs and benefits include:
- Increase the number of cycle trips on the scheme routes by 400% by 2030
  - Increase the number of walking trips by 25% by 2030
  - Halve KSI's (killed or seriously injured) over a five-year period after scheme completion
  - Reduce the total number of collisions from 155 to 77 by 2029
  - Increase the Healthy Street Score (assessment against 10 indicators) in the scheme area by 2025
  - Improve access to employment, skills and education, to achieve 70%+ modal share of sustainable transport in accessing schools and colleges
  - To deliver 5km (2.5km each side) of segregated cycling infrastructure along the A660 Otley Road that ties into the wider cycle network to create a more comprehensive regional and local network.
  - 5 major intersection changes that design out conflict between general traffic and vulnerable road users
  - 6 additional pedestrian crossings
  - De-cluttering of the pedestrian environment (locations to be confirmed)
  - 2 modal filters to restrict vehicular access and prioritise walking and cycling
  - 22 side road treatments giving priority to pedestrians and cyclists
  - 7 additional signalised crossing points being created [CT1] [CK2] to improve pedestrian connectivity and reduce waiting time
  - Creation of dedicated cycling signals to separate motorists, pedestrians and cyclists between St Mark's Road and Shaw Lane,
  - Remove 2 bus stops and consolidate into 1 stop, and upgrade bus stops along the route

- 4 new disability parking bays
- Installation of new benches (locations to be confirmed)
- 33 new trees planted (to replace 11 lost as part of delivery)

4.91 The scheme has a strong strategic case which is centred on the significant positive benefits expected for people walking and cycling and therefore has a very high value for money position when considering the impacts for people walking and cycling. When considering impacts for all users the assessment gives a value for money position of poor to very poor, primarily due to potential delay and rerouting of car traffic.

### **Inclusive Growth Implications**

4.92 The scheme inclusive growth implications include:

- Improved safety and connectivity for cycling, walking and wheeling, which helps make them a more viable travel option for a wide range of people and uses. This improves accessibility, via sustainable transport options, to employment, education, housing and other social value opportunities. This includes three university campuses, two local district centres, an urban park and several jobs linked to the nighttime economy and other business centre services.
- Implementing improvements along a key transport route and in areas with high proportions of residents with relatively low incomes. This will facilitate a better connected and safer transport network that will encourage use of walking, cycling, and public transport enabling those without access to a car to travel safely and efficiently to places where employment, education, and leisure opportunities are available.

### **Equality and Diversity Implications**

4.93 An Equality Impact Assessment (EqIA), equivalent, 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.

4.94 Leeds City Council's, "Equality, Diversity, Cohesion and Integration Impact Assessment" (EDCI), highlighted that the scheme will provide a positive impact with regards to disability and age characteristics, as improved accessibility to bus stops, widened footways and improved pedestrian crossings provide easier movement for those groups. Children and young people are more reliant on public transport, walking and cycling and the proposed changes to the A660 corridor will also help those groups access improved bus services and provide safer cycling facilities, helping them travel independently.

4.95 Regarding gender, it is noted that women are currently less likely to cycle than men. This is due to a number of factors, but road safety concerns are a significant factor, as is the need to travel with children. The provision of safe, segregated cycle infrastructure is therefore likely to benefit women, and for young and older people, who may previously not perceive cycling as a safe and accessible mode of transport. The provision of bus stops in well-lit areas

with heavy footfall will have a beneficial effect on safety and perception of safety, which is also a particular concern for women.

## **Risks**

4.96 The scheme risks include:

- Unchartered statutory undertakers' utilities and contaminated land with unchartered cellars considered to be likely in the Hyde Park Corner area, which could impact the scheme design, delay the programme, and cause additional costs. This is to be minimised by early engagement with Statutory Undertakers and minimising interface during design.
- Partnership / commercial risks including cost escalation, contractual delays and delays to the programme. This is to be mitigated by ensuring contingency is provided for in the planned construction period and timing of delivery is planned to align with lower risk delivery time periods.
- Regulatory / legal risks including time needed to process Traffic Regulation Orders (TROs), including temporary TROs for construction stage, constraints on construction (working time and seasonal restrictions), traffic management and statutory undertakers works permits and the need for temporary bus stops. This is to be mitigated by early and ongoing engagement with relevant stakeholders and obtaining relevant permits to work in place and compliance with statutory undertakers and Network Management requirements.
- Network management risks including disruption on the corridor and wider road network. This is to be mitigated by Leeds City Council and relevant organisations working together to coordinate the planning of roadworks across the city. Communications, through Connecting Leeds, will ensure stakeholders are aware of the works.

## **Costs**

4.97 The total scheme costs are £10,475,000.

4.98 The Combined Authority's contribution is £10,475,000 from the Active Travel Fund Tranche 3.

4.99 As part of the Active Travel Capital Programme Tranche 3 approval the A660 Otley Road scheme costs of £4,785,000 including development costs of £470,000 were approved by the Combined Authority. The increased scheme cost is a result of increased scope, improved design and inflationary cost increases. The change in scope and scheme composition materialised as a result of a scheme review by Active Travel England that sought a higher quality scheme, with associated increased costs. Additional funding has been allocated by Active Travel England to cover the improvement in scheme quality and associated cost increase.

4.100 The Combined Authority will need to enter into an addendum to the funding agreement with Leeds City Council for expenditure of up to £10,475,000 from the Active Travel Fund Tranche 3.

## Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
4 (full business case)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
Approval to Proceed	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	27/07/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	26/09/2025

## Other Key Timescales

- Start on site – 01/09/23  
Works to be split into 10 sections delivered in 4 phases as follows:  
Phase 1 - Sections 2, 4 and 6. (September 2023) £3,005,000
  - Section 2 Headingley Central
  - Section 4 Headingley Hill
  - Section 6 Cliff Road Area
 Phase 2 – Sections 7, 9 and 10 (January 2024) £2,944,000
  - Section 7 Rampart Road Junction
  - Section 9 St Marks Street
  - Section 10 St Mark's Road Junction
 Phase 3 – Sections 1 and 8 (February 2024) £2,305,000
  - Section 1 Arndale Centre
  - Section 8 Clarendon Road Junction
 Phase 4 – Section 5 (May 2024) £1,751,000
  - Section 5 Hyde Park Corner Junction (including land)
- Completion on site – 1 August 2025

## Assurance Tolerances

Assurance tolerances
Combined Authority costs remain within +5% of those outlined in this report. Delivery (DP5) timescales remain within 6 months of those outlined in this report.

## Appraisal Summary

- 4.101 The scheme aims to support inclusivity, accessibility and to help tackle the climate emergency. This is to be achieved through provision of a scheme that improves safety and journey quality, for people travelling by bike and on foot, along this key transport corridor into Leeds city centre.
- 4.102 The business case highlights the overarching strategic importance of the scheme in improving the accessibility and connectivity of sustainable transport to employment, education and social value opportunities along a key corridor in the city. In addition, the safety and journey quality improvements of the scheme can help facilitate an uptake in active travel that can contribute to the decarbonisation of transport and provide health benefits to the users of the scheme.
- 4.103 A value for money assessment was undertaken that focussed on the impacts to the target users of the scheme. This demonstrated significant positive benefits for people travelling by bike and on foot, indicating very high value for money for those users of the scheme, which supports the scheme's primary strategic objectives as well as helping meet various objectives set out in strategy and policy documents for both Leeds City Council and the Combined Authority.
- 4.104 In order to calculate the core economic appraisal the highway impacts were calculated using a transport model that estimated future traffic growth based on pre-pandemic traffic volumes and patterns. Recent traffic data in Leeds illustrates peak hour traffic volumes to be significantly lower than what was observed pre-pandemic meaning the calculations are likely to exaggerate the adverse impacts that may materialise. Additionally, the modelled results did not include the effects of those changing how they travel or choosing not to travel at all. As such, the accuracy of the results and the degree of confidence that can be placed on the disbenefits calculated is affected and should be considered a worst-case scenario. Using this methodology the economic appraisal classified the scheme as having a very poor value for money, when the disbenefits to motor traffic are taken into consideration. In order to address these issues and provide greater confidence in the modelling outputs, it would be required to update the Leeds Transport Model. This work is underway but it would be disproportionate and unjustified to delay this scheme until this model is ready for use. It should be noted that these disbenefits are not considered to be applicable to bus users due to the bus mitigation measures being proposed as part of the scheme design. While there will possibly be some rerouting and delay to car drivers and passengers, this is expected to be minimal.
- 4.105 The value for money positions presented should therefore be viewed as a range, with the core value for money position being a worst-case scenario, which is unlikely to materialise due to the inherent modelling issues. Whereas the alternative, very high value for money assessment, illustrates the level of benefits that could result if the scheme achieves the change in travel behaviour it is seeking, as a transformational active travel scheme. Whilst it

should be expected that a scheme of this nature can have some disbenefits to some users the strategic case for the scheme is strong and it can therefore be determined that this represents the key consideration for progressing the scheme and is in accordance with overarching objectives and visions for the Combined Authority and Leeds City Council.

### **Recommendations**

4.106 The Combined Authority approves that:

- (i) The Active Travel Fund - Tranche 3: A660 Otley Road scheme proceeds through FBC (Decision Point 4) to Activity 5 (Delivery).
- (ii) Approval to the delivery costs of up to £10,005,000 is given, taking the total approval to £10,475,000. The total scheme cost is £10,475,000, which is to be fully funded by the Combined Authority.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with Leeds City Council for expenditure of up to £10,475,000.
- (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 Transport Committee.

### Projects in Stage 3: Delivery and Evaluation

<b>Project Title</b>	<b>Zero Emission Bus Regional Area</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

- 4.107 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.
- 4.108 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. The ZEBRA Project is the first of three projects making up the Zero Emission Bus (ZEB) Programme that will invest in the conversion of the West Yorkshire bus away from diesel vehicles.
- 4.109 The ZEBRA project will introduce the first 111 zero emission buses in this programme. This scheme will introduce buses on routes in Bradford, Leeds and Wakefield. This will be followed by two more phases. Phase 2 will introduce 8 zero emission buses on tendered routes in Calderdale and Kirklees, which will seek committee approval separately. A final phase 3 project to the ZEB Programme is in the early stages of project planning.
- 4.110 This Change Request looks to introduce an additional 25 buses into the scheme as some Local Transport Authorities and partner bus operators have been unable to deliver their original bids approved by DfT. The Combined Authority has been successful, through a bidding process, of demonstrating they and partners First Bus Leeds, are in a strong position for further delivery.
- 4.111 This change request will further improve and uplift the bus service on the selected routes in Leeds, which mainly run through areas of high air pollution and multiple deprivation in the city.



- 4.112 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 therefore introduce ‘top of the range buses’ to those most in need of levelling up.
- 4.113 There will be substantial match funding investment from the bus operators but without the provision of grant these buses would not be introduced so soon, on this scale or to the communities targeted. In addition, the cascading of the remaining bus fleet through other routes will lead to removal of the oldest and most polluting buses in the operator’s fleet from service.
- 4.114 The Zero Emission Bus programme gained approval at decision point 4 (full business case) at the Transport Committee on 01 July 2022.
- 4.115 This scheme supports the Mayoral pledges to tackle the climate emergency and protect our environment and bring buses back under public controlled, introduce simpler fares, contactless ticketing and greener buses.
- 4.116 This scheme also 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.

### **Tackling the Climate Emergency Implications**

- 4.117 It is intended that the new buses will remove the most polluting buses from use, with the better quality buses filtering down the fleet, which will be monitored quarterly.
- 4.118 Charging infrastructure will be introduced strategically to easily enable more electric buses to be added to the fleet.

### **Outputs and Benefits**

- 4.119 The scheme outputs and benefits include:
- Introduce 136 ZEBs to West Yorkshire from March 2024 (an increase of 25 via this Change Request).
  - Supporting electric charging infrastructure for the ZEBs.
  - From March 2024 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.
  - Work will be done in partnership with operators to look to remove the oldest and most polluting buses in services on these routes, with newer vehicles reallocated to other areas in the region. Progress on this will be monitored through quarterly reporting. This scheme will focus the new buses on routes with the lowest air quality. These routes run through

areas that are experiencing the highest levels of social and economic disadvantage, which are worsened by poor air quality.

### **Inclusive Growth Implications**

4.120 The scheme inclusive growth implications are:

- The ZEBs will be used on routes in areas of multiple deprivation that have inequalities in health, air quality and income. This will provide a step change in levelling up these communities so they can use a high-quality sustainable bus services to access training and jobs to tackle economic exclusion.

### **Equality and Diversity Implications**

4.121 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.

4.122 The ZEBs will meet enhanced accessibility requirements set out in the DfT ZEBRA funding guidance, and incorporate audio-visual announcements, hearing loops and improved space for wheelchairs and prams. This will see a positive impact on many groups with protected characteristics, and no negative impacts.

### **Risks**

4.123 The scheme main risks include:

- Delays may be experienced in the delivery of ZEB's due to current supply chain challenges. Mitigation – The 32 ZEBs (initial approval for First Bus in Leeds) have been ordered and the feedback is there are no delays. The additional 25 ZEBs (CR) have already been ordered and First Bus's suppliers have confirmed delivery is expected by DfT deadline of 31 March 2024.

### **Costs**

4.124 The total scheme costs are £69,978,646.

4.125 The Combined Authority's contribution is £30,309,240 from DfT's ZEBRA programme.

4.126 The remaining funding is £39,669,406 Match funding across 3 bus operators (First Bus, Arriva & Transdev).

4.127 The CR is to increase the Combined Authority's funding contribution to First Bus by £5,744,069 taking the total contribution to £30,309,240 (across all operators).

4.128 The Combined Authority will enter into an Addendum to the existing Grant Funding Agreement with First Bus for expenditure of up to £12,635,472 from the DfT Zero Emission Bus Regional Areas (ZEBRA) fund.

## Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
Change request (activity 5)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Operating Officer	31/03/2024

## Other Key Timescales

- Infrastructure construction period - May 2023 to August 2023.
- ZEB Manufacturing period - January 2023 to March 2024.
- All ZEBs delivered on site by end of March 2024.

## Assurance Tolerances

Assurance tolerances
<p>Combined Authority costs remain within those outlined in this report.</p> <p>Delivery (DP5) timescales remain within 6 months of those outlined in this report.</p> <p>Outputs &amp; Benefits remain within -5% of those outlined in this report.</p>

## Appraisal Summary

- 4.129 The Change Request seeks approval of additional DfT ZEBRA funding to contribute to the purchase 25 double decker zero emission buses (ZEBs) and associated infrastructure (9 chargers & 1 transformer) by First Bus Leeds to add to the scope of their scheme operating at Bramley depot.
- 4.130 The scheme has a strong strategic case as the scheme continues to support the Strategic Economic Plan (SEP), West Yorkshire Transport Strategy, Bus Service Improvement Plan (BSIP), Mayoral pledges, Climate Emergency, and several national policies, and Inclusive Growth.
- 4.131 The case for change remains, in West Yorkshire, the Transport sector is the largest emitter of carbon, and some areas have the highest air pollution levels in the UK.
- 4.132 The Change Request has a slightly lower Benefit Cost Ratio (BCR) than the initial scheme. This is not significant enough to alter the overall scheme Value for Money (VfM) for all 3 bus operators, which is still regarded as medium VfM.
- 4.133 All key dates are achievable. All ZEBs and infrastructure have been ordered to reduce the price inflation risk. There are no concerns relating to ZEB delivery delays.

4.134 The scheme is legally compliant with UK subsidy control, state aid and procurement regulations. There are no planning approvals or lease agreements over assets.

### **Recommendations**

4.135 The Combined Authority approves that:

- (i) The change request for the Zero Emission Bus Regional Area scheme to increase the funding approval by £5,744,069, taking the total contribution to £30,309,240, is approved. The total scheme value is £69,978,646.
- (ii) The Combined Authority enters into an Addendum to the existing Grant Funding Agreement with First Bus for expenditure of up to £12,635,472 from the DfT Zero Emission Bus Regional Areas (ZEBRA) fund.
- (iii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the transport committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

## **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.

## **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)**

### **Local Electric Vehicle Infrastructure (LEVI) Programme**

12.1 The Combined Authority approves that:

- (i) The Local Electric Vehicle Infrastructure (LEVI) Programme proceeds through decision point 2 (strategic outline case) and work commences on individual project business cases as outlined in this report
- (ii) An indicative approval to the Combined Authority's contribution of £17,142,000. The total programme value is between £20,642,000 and £32,642,000, dependent on leveraged private sector contributions.
- (iii) Subject to the conditions set by the Programme Appraisal Team, approval to funding of £1,316,000 to progress the Local Electric Vehicle Infrastructure (LEVI) Capability Fund scheme to Activity 5 (Delivery). The total scheme costs are £1,316,000.
- (iv) Indicative approval to funding of £1,500,000 for the Local Electric Vehicle Infrastructure (LEVI) Phase 1 Pilot scheme is given and work commences on Activity 4 (full business case). The total scheme costs are £3,000,000.
- (v) Indicative approval to funding of £14,326,000 for the Local Electric Vehicle Infrastructure (LEVI) Phase 2 scheme is given and work commences on Activity 3 (outline business case). The total scheme costs are £16,326,000.

- (vi) The following development costs are approved:
- £354,953 for the Combined Authority for the LEVI Capability scheme
  - £ 961,047 for the five West Yorkshire partner local authorities for the LEVI Capability scheme
  - £120,000 for the Combined Authority for the Phase 1 LEVI Pilot scheme and the Phase 2 LEVI scheme
- (vii) The Combined Authority enters into a funding agreement for the amounts set out below with each of the five partner councils for the capability fund:
- City of Bradford Metropolitan District Council for expenditure of up to £184,480.
  - Calderdale Council for expenditure of up to £195,000.
  - Kirklees Council for expenditure of up to £188,631.
  - Leeds City Council for expenditure of up to £197,936.
  - Wakefield Council for expenditure of up to £195,000.
- (viii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the transport committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

### **CRSTS Highways Asset Management and Enhancement Programme and Off Highway Walking and Cycling Network**

12.2 The Combined Authority approves that:

- (i) The CRSTS Highways Asset Management and Enhancement Programme for the 2023/24 financial year (year 2) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2023/24, and work commences on the strategic outline case for future years.
- (ii) The CRSTS Off Highway Walking and Cycling Network Programme for the 2023/24 financial year (year 2) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2023/24, and work commences on the strategic outline case for future years.
- (iii) The Department for Transport's Pothole Fund proceeds through decision point 2 to 4 (strategic outline case) and into delivery.
- (iv) An indicative approval is given to the total £248,000,000 for CRSTS Highways Asset Management CRSTS Highways Asset Management and Enhancement programme and £3,440,000 for the Off Highway Walking and Cycling network programme.
- (v) Approval to an additional £35,768,466 of development and delivery costs for quarters 2, 3 and 4 of the CRSTS Highways Asset

Management and Enhancement programme (year 2) is given to provide a total allocation of £48,168,466 for the 2023/24 financial year.

- (vi) Approval to an additional £516,000 of development and delivery costs for quarters 2,3 and 4 of the CRSTS Off Highway Walking and Cycling network programme (year 2) is given to provide a total allocation of £688,000 for the 2023/24 financial year.
- (vii) Approval to the £6,484,800 additional funding awarded from the Department for Transport's Pothole Fund to fund interventions to maintain the highway network prioritised through the CRSTS programme.
- (viii) The Combined Authority enters into addendums to the existing funding agreement(s) with partner councils for expenditure of the apportioned £35,768,466 for CRSTS Highways Asset Management and Enhancement programme (year 2), £516,000 for the CRSTS Off Highway Walking and Cycling Network programme (year 2) for the 2023/24 financial year, and £6,484,800 for the Pothole Fund up to the amounts below:
  - Expenditure of up to £20,297,416 with Bradford Council
  - Expenditure of up to £13,810,080 with Calderdale Council
  - Expenditure of up to £21,839,627 with Kirklees Council
  - Expenditure of up to £33,203,445 with Leeds Council
  - Expenditure of up to £16,478,698 with Wakefield Council
- (ix) Delegations to the Director of Transport Policy and Delivery to amend allocated funding amounts released as part of this decision as required.
- (x) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

12.3 The Combined Authority approves that subject to the conditions set by the Programme Appraisal Team that:

- (i) The CRSTS Highways Asset Management and Enhancement Programme for the 2024/25 financial year (year 3) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2024/25.
- (ii) The CRSTS Off Highway Walking and Cycling Network Programme for the 2024/25 financial year (year 3) proceeds through decision point 2 to 4 (strategic outline case) and delivery continues to end of 2024/25.
- (iii) Approval to an additional £52,736,931 for development and delivery costs for the CRSTS Asset Management and Enhancement

programme (year 3) is given to provide a total allocation of £52,736,931 for the 2024/25 financial year.

- (iv) Approval to an additional £688,000 for development and delivery costs for the CRSTS Off Highway Walking and Cycling network programme (year 3) is given to provide a total allocation of £688,000 for the 2024/25 financial year.
- (v) The Combined Authority enters into addendums to the existing funding agreement(s) with partner councils for expenditure of the apportioned £52,736,931 for CRSTS Asset Management and Enhancement programme (year 3) and £688,000 for CRSTS Off Highway Walking and Cycling Network programme for the 2024/25 financial year (year 3), up to the amounts below:
  - Expenditure of up to £32,607,832 with Bradford Council
  - Expenditure of up to £19,954,032 with Calderdale Council
  - Expenditure of up to £31,866,203 with Kirklees Council
  - Expenditure of up to £50,036,552 with Leeds Council
  - Expenditure of up to £24,589,578 with Wakefield Council
- (vi) Delegations to the Director of Transport Policy and Delivery to amend allocated funding amounts released as part of this decision as required.
- (vii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.



## **CRSTS Safer Roads Programme**

12.4 The Combined Authority approves that:

- (i) The CRSTS Safer Roads Programme proceeds through Decision Point 2 and 4, and delivery continues until the end of 2023/24, and work commences on the development of the strategic outline case for Year 3.
- (ii) An indicative approval to the total CRSTS Safer Roads programme value of £25,000,000 is given.
- (iii) Approval to an additional £4,397,000 of development and delivery costs for quarters 2, 3 and 4 for the CRSTS Safer Roads programme (Year 2) is given to provide a total allocation of £5,647,000 for the 2023/24 financial year. The total allocation up to the end of Year 2 is £10,647,000.
- (iv) The Combined Authority enters into addendums to the existing funding agreements with the five partner councils for expenditure of the apportioned £5,647,000 for the 2023/24 financial year, up to the amounts shown below:
  - City of Bradford Metropolitan District Council for expenditure of up to £1,155,000
  - Calderdale Council for expenditure of up to £440,000
  - Kirklees Council for expenditure of up to £925,000
  - Leeds City Council for expenditure of up to £2,377,000
  - Wakefield Council for expenditure of up to £750,000
- (v) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the Transport Committee. This will be subject to the scheme remaining within the tolerances outlined in this report.

## **Active Travel Fund 3 - A660 Otley Road**

12.5 The Combined Authority approves that:

- (i) The Active Travel Fund - Tranche 3: A660 Otley Road scheme proceeds through FBC (Decision Point 4) to Activity 5 (Delivery).
- (ii) Approval to the delivery costs of up to £10,005,000 is given, taking the total approval to £10,475,000. The total scheme cost is £10,475,000, which is to be fully funded by the Combined Authority.
- (iii) The Combined Authority enters into an addendum to the existing funding agreement with Leeds City Council for expenditure of up to £10,475,000.
- (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 Transport Committee.

## **Zero Emission Bus Regional Area**

12.6 The Combined Authority approves that:

- (i) The change request for the Zero Emission Bus Regional Area scheme to increase the funding approval by £5,744,069, taking the total contribution to £30,309,240, is approved. The total scheme value is £69,978,646.
- (ii) The Combined Authority enters into an Addendum to the existing Grant Funding Agreement with First Bus for expenditure of up to £12,635,472 from the DfT Zero Emission Bus Regional Areas (ZEBRA) fund.
- (iii) Future approvals are made in accordance with the assurance pathway and approval route outlined in this report and where required, any change requests are delegated to the transport committee. 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** - Local Electric Vehicle Infrastructure Scheme Business Case Summary

**Appendix 2** - Highways Asset Management Business Case Summary

**Appendix 3** - Safer Roads Business Case Summary

**Appendix 4** - Active Travel Fund 3 – A660 Otley Road Business Case Summary

## Project Overview

Project Title	Local Electric Vehicle Infrastructure (LEVI) Programme
Main Funding Programme	Local Electric Vehicle Infrastructure (LEVI) Fund
Current Forecast Project cost	£20.642m – £32.642m
Funding Applied for from the Combined Authority now	£1.436m
Other public sector funding amounts and sources	N/A
Private sector funding amounts and sources	Private investment £3.5m - £15.5m

## Scheme Description

The West Yorkshire LEVI Programme will significantly enhance the number of publicly accessible charge points in the region, specifically targeting ‘close-to-home’ charging for residents without access to off street parking.

The programme will leverage private investment for charge points, supported by LEVI funding provided by the Office for Zero Emission Vehicles (OZEV).

The programme includes an element to improve the capability of the Combined Authority and its local authority partners to develop and deliver EV-related schemes through funding three new posts within the CA.

## Business Case Summary

### Strategic Case

The Combined Authority and partners have formally declared a climate emergency and set an ambition to become net zero-carbon by 2038. The West Yorkshire Carbon Emission Reduction Pathways study found that transport is the largest emitter as a sector, dominated by private vehicle use. The West Yorkshire Climate and Environment Plan 2021 – 2024 sets a commitment to accelerate the deployment of electric vehicle charge points across the region with a focus on ensuring equity.

Urban areas in West Yorkshire have been identified as having some of the highest levels of air pollution in the UK outside of London. There are currently 36 Air Quality Management Areas in West Yorkshire and Bradford’s Class C+ Clean Air Zone (CAZ) went live in September 2022. Areas experiencing high levels of deprivation are often disproportionately affected by poor air quality. In West Yorkshire, 20% of neighbourhoods are categorised in the 10% most deprived in England – this is equivalent to more than half a million people.

As of January 2023, there were 832 publicly available electric vehicle charging devices in West Yorkshire. However, government figures predict over 10,000 may be needed by 2030 to meet demand. Although EV charging behaviour patterns have yet to be fully established, it is widely anticipated that most people will charge at home overnight as the most convenient and cheapest method of recharging. A significant proportion of residents in West Yorkshire do not have access to off-street parking for home charging. Current charging provision does not meet the needs of residents.

The government has commitment to ending sales of new petrol and diesel vehicles by 2030, and for all new cars and vans to be fully zero emission at tailpipe by 2035. The West Yorkshire LEVI

Programme looks to significantly accelerate charge point delivery across the region, targeting delivery where it is needed most, primarily to deliver infrastructure for strategic priorities and provide charging provision in residential areas without access to off-street parking, ensuring charge points are easy to use, as well as being fair, inclusive and accessible to all.

### Economic Case

Based on an assessment of both longlist and shortlist of options the preferred option to take forward for further development was:

- **Areas of strategic need + Enabling works / Additional benefits priorities:** Focus on quality with mobility hubs and on-street provision, including placemaking around charge points and local energy production and storage where needed. Focus on build outs on street or creating local hubs on local authority-owned land.

Further work on monetised benefits will be carried out as part of OBC development.

### Commercial Case

A procurement framework is in development for West Yorkshire for use by the LEVI Programme. This will be a competitive process to formalise a working relationship with three private organisations looking to invest in EV charge point infrastructure who will deliver, operate and maintain charge points.

### Financial Case

The West Yorkshire Local Electric Vehicle Infrastructure (LEVI) Programme is designed to significantly accelerate deployment of electric vehicle charge points in the region. The programme will leverage private investment for charge points, supported by LEVI funding provided by the Office for Zero Emission Vehicles (OZEV).

The LEVI programme is made up of the following three schemes:

- Phase 1: LEVI Pilot Funding – Grant funding of £1.5m has been secured, which will look to leverage private investment to deliver a minimum of 150 charge points across West Yorkshire
- Phase 2: LEVI Capital Fund – Grant funding of £14,326,000 allocated to West Yorkshire to extend the pilot scheme to further accelerate delivery of charge points (subject to OZEV approval of proposal). Estimated delivery of between 500 – 1000 charge points
- LEVI Capability Fund - Grant funding of £236,880 allocated to West Yorkshire for resourcing for the planning and delivery of EV Infrastructure (awarded) plus £1,079,120 allocated to West Yorkshire for further resourcing for the planning and delivery of EV Infrastructure (subject to OZEV approval of proposal)

### Management Case

The LEVI Programme has been developed with the West Yorkshire Electric Vehicle Strategy Task Group which includes officers from all 5 district partners. This group meets fortnightly and is used to design, develop and progress EV policy and strategy as well as delivery. Market engagement has been ongoing with various operators and stakeholders throughout the development of this programme. This included a market testing exercises carried out in May and December 2022.

A Programme Board and a LEVI Steering Group has been established to help manage, govern and deliver the project.

### Project Overview

Project Title	CRSTS Asset Management and Enhancement Programme and Off Highway Walking and Cycling Network
Main Funding Programme	City Region Sustainable Transport Settlement (CRSTS)
Current Forecast Project cost	£248,000,000
Funding Applied for from the Combined Authority	£105,630,066 (Years 1 and 2 including the Pothole Fund)
Private sector funding amounts and sources	£0

### Business Case Summary

This programme of schemes will maintain and renew vital highway infrastructure to ensure important transport assets in the region are safe, secure and support active travel, public transport journeys and our local economy and business. The Off Highway Walking and Cycling network schemes will compliment this by working to improve public rights of way across the region. This is the second and third year of a five year programme.

### Strategic Case

The highway network is central to the economic and social wellbeing of the West Yorkshire Region whether it is being used for journeys by bus, car, cycling or walking. Ensuring that it is maintained to a very good standard is an essential part of the transport strategy and a legal requirement. The physical assets to be maintained within it include roads, footways, bridges, retaining walls, roads, pavements, street lighting, bollards, and gullies to drain surface water.

A poorly maintained highway network creates increased dangers for users, congestion and pollution caused by unplanned emergency repairs. Other problems include more damage from the increasing number of extreme weather events such as the freeze thaw cycle which can rapidly increase the size of potholes and road surface damage, leading to increased problems for residents and higher levels of third-party claims against councils.

The CRSTS programme will fund long-term positive investments to maintain and enhance the different types of highway assets. Works will be prioritised through regular planned inspections to identify where the need is greatest and to see where the enhancements would provide the most benefit.

These investments will help to deliver the Mayor's pledges of supporting the levelling up of communities with the greatest needs, supporting businesses and working to reduce carbon emissions in West Yorkshire.

This programme will also fund prioritised repairs and enhancements to the nearby walking and cycling network - more commonly known as the public rights of way network - through a separate funding allocation. This investment will make improvements to paths, cycleways and bridleways which connect communities and provide safe routes to schools and other destinations.

### Economic Case

This programme has been established by a process to identify and prioritise the most beneficial schemes across West Yorkshire undertaken jointly by the five council partners. This process ranks schemes by factors such as the importance of the road, the number of claims for incidents and injury in that place, its repair history, and the impact of the existing facilities on pedestrians and cyclists.

This scheme will improve journey times for road users, provide better safety due to even road surfaces and lead to fewer unplanned roadworks. These will result in better public health as a result of increased cycling and walking, as well as a more pleasant environment to do this in. Based on the scale of benefits provided by similar schemes this scheme should deliver a high benefit cost ratio (BCR).

#### Commercial Case

These schemes will be delivered directly through the teams employed by the partner councils. Where works cannot be carried out by in-house teams, due to the level of work or the need for specialist teams, the five partner councils will jointly enter into short term contracts to achieve cost savings wherever possible.

#### Financial Case

Funding for the entire programme will be from the Combined Authority's CRSTS funding settlement for the five partner councils of West Yorkshire. The distribution of funds between the councils has been agreed by the Yorkshire Highways Alliance Highways Infrastructure Asset Management Board and is based on the length of network each council has to maintain.

The full five-year fund is £248,000,000 for Asset Management and Enhancement, and £3,440,000 for the Off Highway Walking and Cycling network. This strategic outline case is for the delivery of the second year of the programme (2023/24), has a total cost of £48,168,466 for Asset Management and Enhancement, and an additional £688,000 for Off Highway Walking and Cycling improvement. The Pothole Fund is in addition and equals £6,484,800.

#### Management Case

The programme is made up of a list of small schemes to be delivered through existing project management teams based within each council partner, with experience of delivering similar programmes. There is a senior responsible officer and programme manager from the Combined Authority who will oversee the programme with most of the delivery being managed by the project lead in each local authority's team. The project leads will also report on a regular basis to their council's chief officer through the relevant reporting structures up to cabinet level. The programme will also have oversight from the Yorkshire Highways Alliance Highways Infrastructure Asset Management Board.

The five-year programme of works will be completed between April 2022 and March 2027. An approval to proceed for 2024/25 will be submitted to the Combined Authority for approval of the funding for the next financial year.

## Project Overview

Project Title	CRSTS – Safer Roads
Main Funding Programme	City Region Sustainable Transport Settlement
Current Forecast Project cost	£25,000,000
Funding Applied for from the Combined Authority	£4,397,000 £10,647,000 total approval (Years 1 and 2)
Private sector funding amounts and sources	£0

## Scheme Description

This scheme will improve road safety at targeted locations across the five districts within West Yorkshire. This will be done through a wide range of measures, including traffic calming, walking and cycle facilities, speed limit reductions and improved parking management.

The programme will reduce the number of Killed and Serious Injuries (KSIs) incidents and road risks that impact on productivity, social, public and business costs. This will boost accessibility by making it easier to use the transport network through helping to change perceptions and encouraging more cycling, walking and use of public transport, contributing to the decarbonisation of the transport network.

## Business Case Summary

### Strategic Case

In 2021, across West Yorkshire's roads, over 5,000 people were injured in collisions, with thousands of these seriously injured and 47 road users killed; almost half of which were pedestrians or cyclists.

The personal, social, and economic consequences of avoidable collisions form the basis for the West Yorkshire Transport Strategy's ambition to eradicate transport-related deaths. This 'Vision Zero' approach will also contribute to the West Yorkshire authorities' ambitions to improve air quality and achieve carbon neutral status.

Collisions affect not just the victims but their families, friends, and the wider community, with impacts that can be lifechanging and life-long. It is estimated that the annual cost to society of road collisions in West Yorkshire is approximately £441 million per year.

Significant intervention is needed to change the current position and improve safety on roads across West Yorkshire. To achieve the casualty prevention target of zero Killed and Serious Injuries (KSI) by 2040, we would need to see 61 fewer people killed or seriously injured every year.

Casualties among the most vulnerable road user groups show only a slow rate of reduction over recent years. If those rates of reduction continue, West Yorkshire will not meet the 2027 reduction target set within the WY Transport Strategy.

### Economic Case

A benefit to cost ratio in the region of 5.4:1 has been calculated for the schemes to be delivered in Year 2 (2023/24) of the programme which is considered Very High.

### Commercial Case

These schemes will be delivered directly through the teams employed by the partner councils. Where works cannot be carried out by in house teams, due to the level or work or due to the need for specialist teams, the five partner councils will jointly enter into short term contracts to achieve cost savings wherever possible. The partners already work closely together on procurement through the Yorkshire Highway Alliance.

#### Financial Case

The total programme fund is £25,000,000 and will come from the Combined Authority's City Region Sustainable Transport Settlement (CRSTS) fund over a five-year period with the funds allocated to each of the West Yorkshire districts based on the 2021 census population numbers.

This strategic outline case covers quarters 2, 3 and 4 of the 2023/24 financial year, which is Year 2 of the overall programme. The total cost for Year 2 is £5,647,000 of which £1,250,000 (22%) has already been approved at Combined Authority committee in February 2023. This business case is seeking the approval of the remaining £4,397,000 for the rest of the 2023/24 financial year.

#### Management Case

The five West Yorkshire districts have experience of delivering similar safety projects, with the proposed approach to delivery being to use existing management and governance structures within each district.

Each of the districts will have a project lead who will oversee delivery of the schemes in their area, with an overarching Project Manager to oversee delivery.

Project leads in each district will report, on a regular basis, to their Chief Officer through existing reporting structures. They will also be responsible for reporting to the Combined Authority on a quarterly basis. The West Yorkshire Safe Roads Steering Group will provide regular programme updates for the West Yorkshire Safe Roads Executive which will then be ratified at the Vision Zero Board.



### Project Overview

Project Title	Active Travel Fund - Tranche 3 - A660 Otley Road
Main Funding Programme	Active Travel Fund
Current Forecast Project cost	£10,475,000
Funding Applied for from the Combined Authority	£10,475,000
Other public sector funding amounts and sources	N/A
Private sector funding amounts and sources	N/A

### Scheme Description

The scheme will introduce a sustainable travel corridor along the A660 Otley Road between St Mark's Road, adjacent to the University of Leeds, and Shaw Lane in the centre of Headingley. The scheme will incorporate a 2.5km segregated cycle route (5km total) on the northbound and southbound side of the A660, as well as junction and traffic signal improvements to facilitate safer active travel. Bus stop improvements, new public realm, footway widening and upgrades, directional signage and cycle parking will also be included in the scheme.

### Business Case Summary

#### Strategic Case

The A660 scheme is being delivered through the Department for Transport's (DfT) Active Travel Fund (ATF) Tranche 3, which aims to reallocate road space to support safe walking and cycling and to help make sure the road, bus and rail networks are ready to respond to future increases in demand and improve transport connectivity.

The scheme covers the A660 between Headingley and the University of Leeds and seeks to encourage walking and cycling uptake and create a shift from the car to reduce congestion levels, improve air quality, and provide better opportunity for sustainable travel along this key travel corridor in Leeds. This supports the objectives of the ATF programme, the West Yorkshire Mayor's climate emergency pledge, inclusive growth, 21st Century Transport, and Climate Emergency priorities of the Strategic Economic Framework (SEF).

The provision of improved active travel infrastructure along the A660 supports inclusive growth as it will benefit many of the areas and communities along the corridor, including those which suffer from high levels of income and health deprivation, to access active transport options, to improve opportunity for access to employment, education, and housing in the city.

The scheme will also complement several other planned active travel schemes across the corridor and, within the city centre.

#### Economic Case

The economic appraisal of the preferred option calculated significant benefits (of around £40m) for pedestrians and cyclists resulting from the scheme; these comprise of health benefits (£33m)

journey quality and mode shift benefits (£5m) and safety benefits (£1m). The scheme will also introduce journey time and vehicle operating cost disbenefits to general traffic.

#### Commercial Case

The commercial case outlines the market drivers for the scheme, including the necessity for this public funding to provide improved pedestrian and cycling infrastructure. A preferred contractor has been identified and will be procured using Leeds City Council's established contractor frameworks.

#### Financial Case

The total scheme cost is estimated as £10,475,000. The Combined Authority's contribution is up to £10,475,000 and is to be funded from the Active Travel Fund Tranche 3 allocation awarded by the Department for Transport.

The scheme cost includes allocations for risk, contingency, inflation and an estimated cost for land purchase, which is yet to be finalised.

#### Management Case

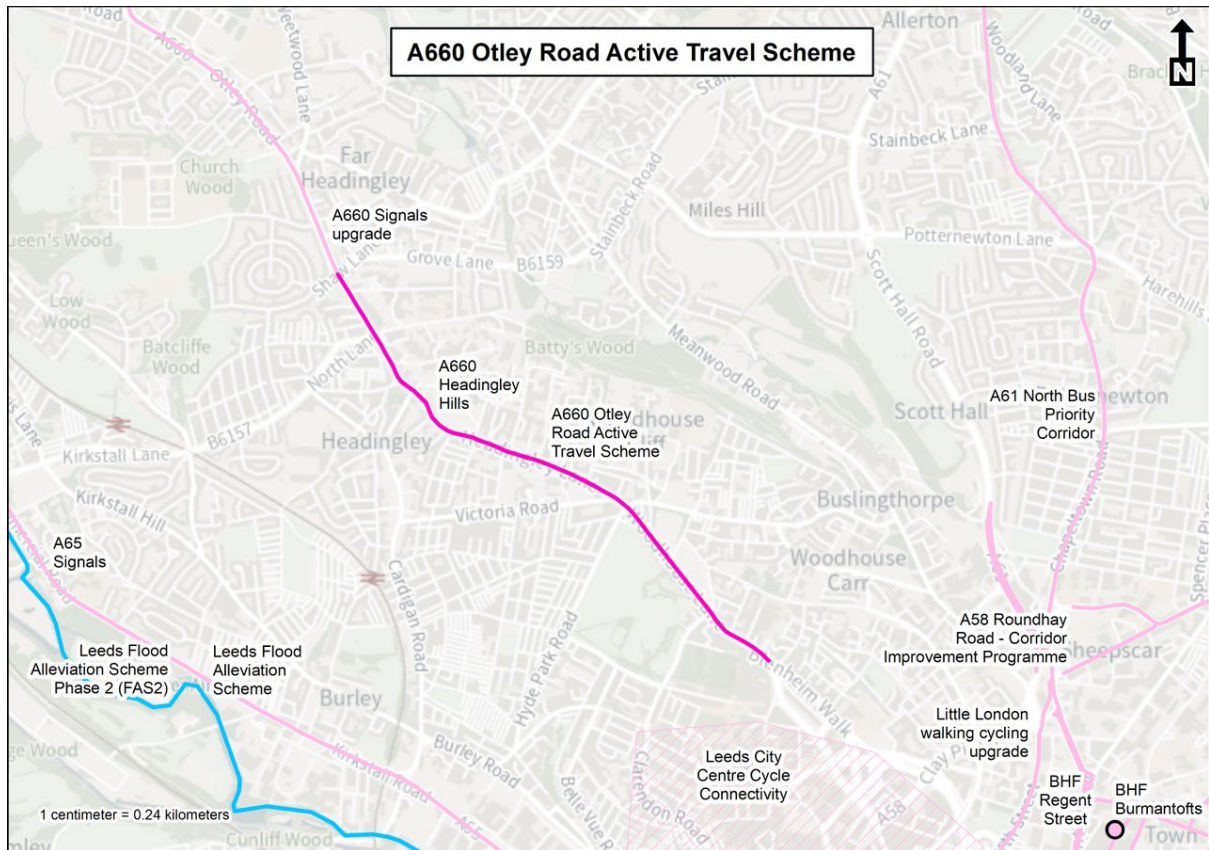
Leeds City Council is the lead promoting authority and will manage the contract with the identified contractor when procured. Governance structures for the project are already in place as part of the council's Active Travel Programme Board.

The scheme infrastructure is to be predominantly located within the public highway, with one parcel of land required to be purchased from the Combined Authority. Planning permission is not required but Traffic Regulation Orders are needed to deliver the scheme.

The scheme is to be delivered in phases with some works having already taken place. The scheme is due to be completed in August 2025.

## Location Map

The following map shows the location of the A660 Otley Road scheme:



Please note, depending on the level of scheme development, the location and scope of the schemes indicated here are indicative only.

For further information on Combined Authority schemes across the Leeds City Region, please refer to: <https://www.westyorks-ca.gov.uk/growing-theeconomy/leeds-city-region-infrastructure-map>

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Report to: West Yorkshire Combined Authority

Date: 27 July 2023

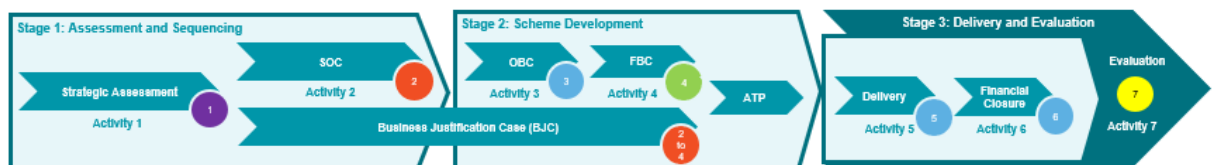
Subject: Project Approvals - Investment Priority 6 – Culture and Creative Industries, Sport and Physical Activities

Director: Phil Witcherley, Interim Director Inclusive Economy, Skills & Culture

Author: Craig Taylor, Head of Portfolio Management and Appraisal

## 1 Purpose of this report

- 1.1 To report on proposals for the progression of, and funding for projects under Investment Priority 6 – Culture and Creative Industries, Sport and Physical Activities, 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) – Culture, Creative Industries, Sport and Physical Activities

- 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 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 Both schemes, seeking approval via this report, have an Evaluation Plan in place, which has been devised in consultation with the Combined Authority's Culture, Heritage and Sport Evaluation lead, 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.

### **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>Bradford City of Culture 2025</b></p> <p>Bradford</p>	<p><b><u>Scheme description</u></b></p> <p>Bradford was announced as the UK City of Culture 2025 on 31 May 2022. Bradford's year of culture will build on its strong cultural heritage and will celebrate the area's rich and diverse local culture with a programme of events that will be staged by a range of organisations, including small, third sector and charitable organisations.</p> <p>The scheme will be funded by the gainshare allocation for Investment Priority 6 – Culture and Creative Industries, Sport and Physical Activities</p> <p><b><u>Impact</u></b></p> <p>Alongside a comprehensive and complementary programme of regeneration, UK City of Culture status will change the story about Bradford and challenge the perceptions of a city that has laid the foundations for modern society in Britain. It will bring economic growth, improved quality of life and create a legacy of more visitors, new jobs and more people attracted to living in a place of great opportunity.</p> <p><b><u>Decision sought</u></b></p> <p>Approval to proceed through decision point 1 (strategic assessment) and work commences on the business case.</p> <p>Total value of the scheme – To be determined</p> <p>Total value of Combined Authority funding - To be determined</p> <p>Funding recommendation sought - £300,000</p> <p>A decision by the Combined Authority is sought as part of this report</p>
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<p><b>You Can Make it Here – Skills and Business Support for Culture</b></p> <p>West Yorkshire</p>	<p><b><u>Scheme description</u></b></p> <p>This scheme will deliver a range of creative industry skills and business support across all five West Yorkshire districts increasing opportunities for West Yorkshire residents to build a career in the creative, culture or sport industries.</p> <p>This scheme will be funded by the Combined Single Investment Fund (SIF).</p> <p><b><u>Impact</u></b></p> <p>The scheme has been designed to increase employment levels in Creative and Cultural industries across West Yorkshire by increasing knowledge, skills and networking.</p> <p>Benefits of the scheme include improved job opportunities to build a career in the creative industries, increased accessibility for disabled artists and audiences at venues, economic growth, improved access to high quality events, improved physical and mental health and wellbeing and improved cultural infrastructure and sustainability.</p> <p>Value for money or benefit cost ratios have not been provided for this scheme and will be calculated before delivery.</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 - £1,734,750</p> <p>Total value of Combined Authority funding - £1,734,750</p> <p>Funding recommendation sought - £1,734,750</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 22 June 2023, 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

<b>Project Title</b>	<b>Bradford City of Culture 2025</b>
<b>Stage</b>	1 (assessment and sequencing)
<b>Decision Point</b>	1 (strategic assessment)

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

- 4.3 Bradford was announced as the City of Culture 2025 on 31 May 2022 by the Secretary of State for Digital, Culture, Media and Sport. Bradford's year of culture will build on its strong cultural heritage, including becoming the first UNESCO City of Film in 2009, the Brontës, JB Priestley, and a UNESCO World Heritage site in Saltaire, in addition to significant museums such as the National Science and Media Museum, galleries and Bradford Theatres. Bradford City of Culture 2025 will celebrate the area's rich and diverse local culture with a programme of events that will be staged by a range of organisations, including small, third sector and charitable organisations.
- 4.4 Alongside a comprehensive and complementary programme of regeneration, City of Culture status will change the story about Bradford and challenge the perceptions of a city that has laid the foundations for modern society in Britain. It will bring economic growth, improved quality of life and create a legacy of more visitors, new jobs and more people attracted to living in a place of great opportunity.
- 4.5 Bradford district is ranked the fifth most income deprived and sixth most employment deprived local authority in England. Bradford's year as city of culture brings with it opportunity to continue and maximise the city's ongoing work to address these challenges and to raise the quality of life for all residents. Alongside the planning of the cultural events that will be held in the city complimentary programmes of regeneration and enhancement include:
- The Council's regeneration strategy which aims to renew and revitalise Bradford City Centre as a place for living and leisure, and investment in key towns and places such as Keighley, Ilkley and Shipley

- The transformation of Bradford’s city centre into a new city village through a partnership with Muse and Homes England.
  - The delivery of a new through rail line, joining Bradford with other key northern economies such as Leeds, Manchester and Liverpool through the Southern Gateway Board.
  - A new covered market with performance space and a new 4000 seat entertainment venue in the former Odeon Cinema building.
- 4.6 The business case for Bradford City of Culture 2025 is still in development and will be submitted later this year. Bradford City of Culture 2025’s total scheme costs will be in the region of £45,000,000, from various sources including Government, Heritage England, Bradford Council, the Combined Authority and sponsors. To enable the development of the business case and to build capacity in order to be ready to scale up and contribute maximum impact ahead of the year of culture, capacity and development costs of £500,000 are required. The Combined Authority’s contribution for this capacity and development stage is £300,000 from the gainshare allocation for Investment Priority 6 – Culture, Heritage and Sport. The remaining funding of £200,000 is from event income and sponsors.
- 4.7 The early capacity funding will be concentrated on the role of small, charitable and nonprofit community focused organisations in Bradford as they are central to the success of Bradford’s City of Culture 2025. Following a call for projects, grants will be provided to these organisations in order to build their capacity in order to be ready to scale up and contribute maximum impact ahead of the year of culture. The grants will cover a range of support which will be defined following the call for projects and be based on value for maximum impact and is likely to include bespoke requirements for activities including mentoring and partnering with larger organisations, technical support, capacity to engage volunteers, how to move products to market and national and international promotion. This will contribute to creating a robust sector of small, charitable and nonprofit community focused organisations with the wherewithal and capability to deliver maximum impact not only during the city of culture but for a lasting legacy beyond 2025.

### **Tackling the Climate Emergency Implications**

- 4.8 Climate change and sustainability are central to all stages of the planning and implementation of the cultural events as they are developed and hosted leading up to and including Bradford’s year of Culture 2025. Detailed information will be included in the next business case submission.

### **Outputs and Benefits**

- 4.9 Outputs and benefits for Bradford 2025 will be detailed in the next business case submission.
- 4.10 The development costs requested will provide a long term legacy of a robust sector of small, charitable and nonprofit community focused organisations, leading, together with the wider business case, increased visitors to the region

for leisure, new jobs, contributing to economic growth and improved quality of life. Outputs will include:

- Approximately 15 organisations assisted with capacity building and training
- Approximately 30 events developed as a result of capacity building
- Approximately 10 jobs and 200 volunteering opportunities created

### **Inclusive Growth Implications**

- 4.11 Bradford City of Culture 2025 has inclusivity at its centre, with the promotion of inclusion and diversity a key aim. Throughout planning the need to ensure that generated economic growth is distributed equally and equitably across the district and amongst communities will be central.
- 4.12 Further details will be included in the next business case submission.

### **Equality and Diversity Implications**

- 4.13 An initial Equality Impact Assessment (EqIA) has been undertaken and ongoing equality and diversity impacts will be assessed and taken account of as part of the development of this scheme and the business case development.

### **Risks**

- 4.14 The scheme risks will be determined in the next business case submission.

### **Costs**

- 4.15 Bradford City of Culture 2025's total scheme costs will be in the region of £25,000,000, from various sources including Government, Heritage England, Bradford Council, the Combined Authority and sponsors.
- 4.16 The total scheme costs at this capacity and development stage are £500,000.
- 4.17 The Combined Authority's contribution for this capacity and development stage is £300,000 from the gainshare allocation for Investment Priority 6 – Culture, Heritage and Sport. The remaining funding of £200,000 is from event income and sponsors.
- 4.18 The Combined Authority will need to enter into a funding agreement with Bradford Council for expenditure of up to £300,000 from the gainshare allocation for Investment Priority 6 – Culture, Heritage and Sport

### **Assurance Pathway and Approval Route**

- 4.19 To be determined in consultation with the proposer.

### **Other Key Timescales**

- Submission of business case – November 2023 for approval in February 2024.

### **Assurance Tolerances**

4.20 To be determined as part of the next business case appraisal.

### **Appraisal Summary**

4.21 Bradford City of Culture 2025 has a strong strategic fit to the Combined Authority's investment priorities and mayoral pledges and will be explored in more detail after the development of the main business case. The capacity and development costs requested will make a helpful contribution towards building capacity in small organisations in order to maximise the impact during and following Bradford City of Culture 2025.

### **Recommendations**

4.22 The Combined Authority approves that:

- (i) The Bradford City of Culture 2025 scheme proceeds through decision point 1 (strategic assessment) and work commences on the business case.
- (ii) Approval is given to the Combined Authority's contribution of £300,000.
- (iii) The Combined Authority enters into a funding agreement with Bradford Council for expenditure of up to £300,000.

## Projects in Stage 2: Scheme development

<b>Project Title</b>	<b>You Can Make it Here - Skills and Business Support for Culture</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

4.23 You Can Make it Here – Creative Industries Skills and Business Support (YCMIH) will provide a bespoke range of skills and business support to address a range of market failures in West Yorkshire’s Culture, Heritage and Sport Sectors. Support will be delivered to businesses, residents and higher education leavers, with an aim to diversify and increase the creative industries talent pools by targeting people who have historically missed out on creative and cultural opportunities due to socio-demographic reasons, with a focus on how to make culture, heritage and sport industries, workplaces and events as accessible and inclusive as possible.

4.24 This scheme consists of the following strands:

- Creative Catalyst: will increase the creative exports from the region including products, services, production, and tourism, and increase the diversity in leadership in the creative industries sector.
- Events and Venue Accessibility Resource: will make West Yorkshire cultural events and venues more accessible to disabled artists and audiences.
- Freelance and micro business support: This strand will provide grants to Local Authorities to fund events, deliver development work, increase the diversity of memberships, engage people from disadvantaged communities and develop a pipeline of graduates. The CA will also procure a central service to deliver a programme of creative industries skills training and business support on a modular basis, to freelancers within Local Authority networks, and to refer participants into further business support through the CA ‘Gateway’ Service.

- Heritage and Sport Asset-Owning Business Support Pilot: developed in consultation with Historic England, this strand will provide sessions (business support tailored to different business models including non-profits & CICs) on low carbon heating and retrofitting measures.
  - Mayor's Screen Diversity Programme: will increase the number of people with protected characteristics working in creative and/or cultural sectors.
  - Year of Culture Knowledge Transfer and Talent Escalator: will ensure that Year of Culture teams learn from each other and benefit from each other's findings, local knowledge, and insight, by facilitating knowledge-exchange talent escalator sessions for people working on Year of Culture programmes. This will include local authority officers, external delivery partners, and freelancers.
- 4.25 Two strands of activity within the scheme (Mayor's Screen Diversity Programme and Creative Catalyst) are continuations of previous interventions with proven impact, with alterations responding to evaluation findings.
- 4.26 The objectives of this scheme include:
- More people have fair, well-paid work in these sectors
  - People in West Yorkshire are confident and supported to found and grow businesses in the creative industries, heritage, and sports sectors.
  - West Yorkshire people from all backgrounds have the skills, opportunities, connections, and confidence to build a sustainable career in the culture, creative industries, heritage and sport sectors.
  - Freelancers are networked, know where to find help and resources, and are confident about their futures in West Yorkshire.
  - Creative industries, heritage, and sports sectors view West Yorkshire as a desirable place to locate.
  - Creative industries, heritage, and sports sectors in West Yorkshire nurture talent and create well-paid work.
  - We will work with Further Education and Higher Education Institutions on joined-up approaches to meeting the regional demand for skills in the creative industries, heritage and sport sectors, and share lifelong learning opportunities.
- 4.27 Consultations have been held with key stakeholders which has shaped the development of the programme and the strands that are included in it. This has ensured that the development of the programme and associated strands are fit for purpose and reflect existing need within the West Yorkshire districts.
- 4.28 The scheme has had support from Local Authority Culture Leads, an internal CA policy review board on 6 October 2022, the Culture, Heritage and Sport Committee on 26 January 2023 and a Combined Authority Directors of Development meeting on 3 February 2023.



- 4.29 The scheme contributes towards the Culture, Heritage and Sport (CHS) Framework (which was approved by CHS Committee, LEP and CA in autumn 2022) and the West Yorkshire Combined Authority Employment and Skills Framework by aiming to create high quality careers network, support the development of leadership and management skills, and create role models and champions to inspire and mentor individuals.
- 4.30 A summary of the scheme's business case is included in **Appendix 1**.

### **Tackling the Climate Emergency Implications**

- 4.31 The business support for asset-owning heritage buildings will include sessions on low-carbon heating and heat capture retrofit solutions. The [Grosvenor Report](#) (commissioned by Historic England, National Trust, Peabody Trust) notes the lack of a joined up national strategy to address this issue, and the CA have worked in consultation with Historic England on this pilot. The [Heat and Buildings Strategy](#) makes specific reference to heritage buildings owned or managed by voluntary sector organisations, which are likely to fall outside of the first tranche of regulation on the natural appliance regulation cycle.
- 4.32 The Year of Culture Peer Learning strand will include sessions on reducing the carbon impact of cultural activities (events and programmes) and promoting active travel. This activity will align with the Julie's Bicycle (ACE national bridge organisation) '[Season of Change](#)' principles for running a sustainable event or project.

### **Outputs and Benefits**

- 4.33 The scheme outputs and benefits will be delivered by 2025 and include:

#### Creative Catalyst

- Taking 30 Creative Industry businesses have diversified revenue and increase creative exports from the region.
- Providing 30 Creative Industry businesses with access to Legal and Professional Services.
- Take 15 screen businesses on an international trade delegation.
- Engage 20 individuals who will participate in the Mentoring programme.
- Participants would benefits from professional and legal support enabling a greater level of growth.
- Those mentored would benefits from an increased career progression upskilling individuals within the region.

#### Events and Venue Accessibility Resource

- Ensure 50 events have been made more accessible with accessibility services provision.
- Upskilling 50 staff to enable them to host events that have accessibility designed-in from the start and marketing those events to disabled audiences.

- Provide small-scale capital grants to 10 organisations to make their venues more accessible.

Freelance and Micro-business support

- 150 Creative Industries freelancers and microbusinesses (30 per Local Authority) supported with skills training, business support, knowledge sharing and networking.
- Support 75 (15 per Local Authority) recent Creative Industries graduates with skills training, business support, knowledge sharing and networking.
- This will see an increased capacity for freelancer networks resulting in a larger number of freelancers and micro-businesses receiving skills training, business support, knowledge sharing and networking.

Heritage and Sport Asset-Owning Business Support Pilot:

- Ensure 60 Heritage and Sport asset-owning organisation have received business support, increase resilience, revenue, and volunteer numbers.
- Organisation would be supported by greater engagement and volunteers to support their strategic aims and increase resilience.

Mayors Screen Diversity Programme:

- Provide 160 individuals from under-represented groups with screen skills training, with 50% in employment or further training.
- This will support individuals from under-represented background gain important experience in the screen industry enabling greater opportunities to progress in their chosen field.
- This will support the private sector meet persistent skills shortages which they have previously identified.

Year of Culture Knowledge Transfer and Talent Escalator Delivery

- 30 Year of Culture personnel (including freelancers) have participated in knowledge exchange activities.
- 30 freelancers/micro businesses have participated in talent escalator activities.
- Increased knowledge sharing between organisations resulting in a greater understanding what assists in realising success. This will reduce reputational risks and increase opportunities beyond the specific year of activity.
- Upskilling of individuals in the creative industry to further strengthen the creative offer within West Yorkshire.

**Inclusive Growth Implications**

4.34 The scheme inclusive growth implications include:

- Wellbeing: The scheme supports Peer Learning between the 5 year of culture programmes which are taking place in each local authority between 2023-25. These year of culture programmes aim to increase access to cultural activities for people across the region, from all West

Yorkshire communities. The Peer Learning strand of this scheme will support best practice in making activities inclusive, specifically through sessions on EDI and Accessibility, community inclusion / co-design and social impact and volunteer engagement and coordination.

- **Transferable and Relevant Skills:** The scheme has been designed to increase employment levels in Creative and Cultural industries across West Yorkshire, particularly for those from under-represented groups, tackling barriers related to key talent pipelines. As such, the programme will have a long-lasting positive impact on skills in the region. Key interventions include: the Mayors' Screen Diversity Programme, which trains under-represented people in behind-the-camera screen skills and has a proven track-record of surpassing targets on ethnic background, disability and gender; Freelancer and Micro Business Support strand, which will increase the capacity of networks in each authority to bring in freelancers from underrepresented groups, and recent graduates from Further Education and Higher Education who are taking the first steps to establishing a business, signposting them to generic support and The Year of Culture Peer Learning strand which will include Talent Escalation sessions to enable freelancers, microbusiness and volunteers working on Year of Culture's.
- **Good Work:** The Accessibility strand of the scheme will enable creative businesses to employ disabled artists and producers by creating an environment where staff are trained on accessibility, have correct policies in place, and know where to find resources. The capital grants scheme will make cultural venues more accessible, removing barriers that prevent disabled people working there. The Creative Catalyst Growth Accelerator strand will support creative businesses to expand their reach and engagement and/or explore new business models. This will help them realise the full economic potential from their activities by accessing critical support from the professional services sector. This will diversify revenue and attract investment, creating well paid jobs and supporting the sustainability of the sector.

### **Equality and Diversity Implications**

- 4.35 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 scheme and the business case development.
- 4.36 The promoters have identified that Age, Disability, Race, Sex and Pregnancy and Maternity are protected characteristics which are underrepresented in the creative workforce. All activities for this scheme must therefore a) reduce barriers to participation; b) include targeted marketing to underrepresented communities; c) EDI participation targets set as conditions in tenders for delivery; d) the freelancer/microbusiness strand, which specifically targets higher education graduates (typically skewed to a younger demographic) must also support older people to enter the creative workforce.

### **Risks**

- 4.37 The scheme risks include:

- Marketing of creative industry business support and generic business support causes confusion within the sector, reducing the benefits of the project. This will be mitigated by the project manager reporting to the Business Support team on a dotted line basis – and liaising with marcomms colleagues on branding to ensure clear communications and branding around the CA packages of support, and coherent referrals between support services signposting other opportunities.
- The companies used to deliver the services are unable to or fail to attract a diverse cohort. This will be mitigated by including clear tender requirements and clawback provisions.
- Lack of capacity from Year of Culture teams to engage in knowledge transfer activities. This will be mitigated by strands having budgets to cover travel expenses and back-fill for freelance producers, artists, etc., to participate at no extra cost.

### Costs

- 4.38 The total scheme costs are £1,734,750.
- 4.39 The Combined Authority’s contribution is £1,734,750 from the Combined Authority’s Single Investment Fund (SIF).
- 4.40 Funding has been allocated to the 6 strands and programme budget as per the following:

Stand Name	Funding Amount (£)
Creative Catalyst	£380,000
Events and Venue Accessibility Resource	£150,000
Freelance and micro business support	£350,000
Heritage and Sport Asset-Owning Business Support Pilot	£165,000
Mayor’s Screen Diversity Programme	£180,000
Year of Culture Knowledge Transfer and Talent Escalator	£100,000
Programme Costs	£281,250
Inflation	£128,500
Total	£1,734,750

### Assurance Pathway and Approval Route

Assurance pathway	Approval route	Forecast approval date
2 to 4 (business justification)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority	27/07/2023
Approval to Proceed	Recommendation: Combined Authority's Programme Appraisal Team	11/08/2023

	Decision: Combined Authority's Chief Operating Officer	
5 (delivery)	Recommendation: Combined Authority's Programme Appraisal Team Decision: Combined Authority's Chief Executive	30/09/2025

### Other Key Timescales

- Procurement start date: June/July 2023
- Delivery start date: September 2023
- Programme evaluation: January 2026

### Assurance Tolerances

Assurance tolerances
<p>Combined Authority costs remain within of those outlined in this report.</p> <p>Delivery (DP5) timescales remain within 6 months of those outlined in this report.</p> <p>Outputs: Remain within -10% of those outlined in this report</p>

### Appraisal Summary

- 4.41 It is recognised that this scheme aims to provide a significant positive impact across the West Yorkshire region for residents and businesses with a clear strategic fit. The Strategic Case has been appraised as Green/Amber as the scheme clearly aligns with the existing strategies and policies of the Combined Authority.
- 4.42 The overall business case was rated Amber due to some areas of weakness relating to the absence of key documents and information which were not provided at the level of detail expected at business justification stage. It was acknowledged that some of the required information could not be provided due to the unconfirmed programme scope due to funding not being secured and lack of internal resource. Work is ongoing to produce these documents which will be in place ahead of delivery.
- 4.43 Overall appraisal believe this could be a significantly positive scheme as it aims to offer a wide range of positive interventions across the West Yorkshire region. Appraisal does note that work is still required on a number of key documents which the project team are developing ahead of delivery.

### Recommendations

- 4.44 The Combined Authority approves that:
- (i) The You Can Make it Here – Creative Industries Skills and Business Support 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 £1,734,750 is given. The total scheme value is £1,734,750.
- (iii) 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.

### **Projects in Stage 3: Delivery and Evaluation**

4.45 There are no schemes to review at this stage or enter scheme details.

### **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.

### **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)**

#### **Bradford City of Culture 2025**

12.1 Combined Authority approves that:

- (i) The Bradford City of Culture 2025 scheme proceeds through decision point 1 (strategic assessment) and work commences on the business case.
- (ii) Approval is given to the Combined Authority's contribution of £300,000.

- (iii) The Combined Authority enters into a funding agreement with Bradford Council for expenditure of up to £300,000.

### **You Can Make it Here – Creative Industries Skills and Business Support**

12.2 Combined Authority approves that:

- (i) The You Can Make it Here – Creative Industries Skills and Business Support 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 £1,734,750 is given. The total scheme value is £1,734,750.
- (iii) 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.

## **13 Background Documents**

13.1 None as part of this report.

## **14 Appendices**

**Appendix 1** - You Can Make it Here – Skills and Business Support for Culture Business Case Summary



## Project Overview

Project Title	You Can Make it Here – Creative Industries Skills and Business Support
Main Funding Programme	Gainshare – IP6
Current Forecast Project cost	£1,734,750
Funding Applied for from the Combined Authority now	£1,734,750
Other public sector funding amounts and sources	N/A
Private sector funding amounts and sources	N/A

## Scheme Description

You Can Make it Here – Creative Industries Skills and Business Support (YCMiH) will provide a bespoke range of skills and business support to address market failures in West Yorkshire's culture, heritage and sport sectors.

Support will be delivered to businesses, residents and higher education leavers, and aims diversify and increase the talent pool for creative industries.

The scheme will target people who have historically missed out on creative and cultural opportunities due to socio-demographic reasons. YCMiH has a focus on how to make the culture, heritage and sport industries as accessible and inclusive as possible.

## Business Case Summary

### Strategic Case

You Can Make it Here aligns with the strategic aims of the 5 West Yorkshire Local Authorities and the Combined Authority, as well as other national and local strategies and policies. Key objectives of the programme are to ensure:

- More people have fair, well-paid work in these sectors.
- People in West Yorkshire are confident and supported to found and grow businesses in the creative, heritage, and sports sectors.
- West Yorkshire people from all backgrounds have the skills, opportunities, connections and confidence to build a sustainable career in the culture, creative industries, heritage and sport sectors.
- Freelancers are networked, know where to find help and resources, and are confident about their futures in West Yorkshire.
- Creative industries, heritage, and sports sectors view West Yorkshire as a desirable place to locate.
- Creative industries, heritage, and sports sectors in West Yorkshire nurture talent and create well-paid work.

- The Combined Authority programme team will work with Further Education and Higher Education Institutions on joined-up approaches to meeting the regional demand for skills in the creative industries, heritage and sport sectors, and share lifelong learning opportunities.

The scheme will:

- Increase the number of people working in West Yorkshire's creative industries, heritage and sport sectors, and ensure they reflect the diversity of our communities.
- Increase the number of higher education graduates taking up work in these sectors.
- Increase the number of people with protected characteristics working in these sectors.
- Increase diverse leadership in the creative industries, heritage and sports sectors.
- Increase creative exports from the region including products, services, production and tourism.
- Ensure that major Year of Culture and/or City of Culture initiatives create jobs and will develop skills across the region, creating a sustainable cultural ecosystem.
- A range of different models, including co-operatives, CICs and social enterprises, benefit from the Combined Authority's business support offer.
- Individuals would develop the skills themselves to enable them to host events that have accessibility designed in from the start.

Ensure events and venues will be able to easily procure accessibility services and are more accessible.

#### Economic Case

This scheme will make a significant change in how West Yorkshire supports diversity in the creative, cultural, heritage and sport sectors.

The scheme aims to develop the cultural landscape of the West Yorkshire region and increase economic benefits to the region through cultural and creative means.

Interventions will take place in each of the five Local Authorities in West Yorkshire to ensure each district receives an equal split of support.

#### Commercial Case

Procurements that will be undertaken as part of this scheme will be in line with the Combined Authority's procurement procedures.

#### Financial Case

The total scheme cost is £1,734,750. This will be funded entirely from the Combined Authority's Gainshare fund.

#### Management Case

The scheme will be managed by the West Yorkshire Combined Authority. A governance structure is in place consisting of a Programme Delivery Team, who will manage the programme on a day-to-day basis, with any escalation or change management approvals being the responsibility of the Senior Responsible Officer and, if deemed necessary the Culture, Heritage, and Sport Committee.



**Report to:** West Yorkshire Combined Authority

**Date:** 27 July 2023

**Subject:** **Governance Arrangements**

**Director:** Ben Still, Chief Executive

**Author:** Julie Haigh, Senior Executive Support 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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No

## 1. Purpose of this Report

- 1.1 To provide the Combined Authority with an update on the process to seek new private sector members for the LEP Board.

## 2. Information

- 2.1 It was previously agreed that recruitment to LEP Board vacancies would not be undertaken until the governance changes stated within the LEP Integration Plan are in place. These were approved at the March meetings of both the LEP Board and the Combined Authority. As part of the governance changes, the Private Sector Recruitment Process has also been updated in line with the LEP Integration Plan and was approved at these meetings also.
- 2.2 These approvals then allowed for the recruitment of private sector Board members to commence as soon as possible. At the June LEP Board meeting the Board had several private sector member vacancies and a recruitment campaign has taken place in the hope to fill these vacancies with individuals who would ideally, but not exclusively, come from the voluntary and community, fintech, healthtech, engineering and clean growth/environmental technologies sectors in order for the Board to reflect the diverse communities, businesses and geography of West Yorkshire, including that of young people.

- 2.3 In recognition of the fact that recruitment would be undertaken in-between the cycle of LEP Board meetings, the LEP Board delegated authority to the Mayor and the Chief Executive to make appointments as appropriate to the LEP Board and to update the Board accordingly.
- 2.4 The closing date for those wishing to be considered was 15 May and meetings with an Appointments Panel were convened on 18 and 19 July. These comprised the Mayor, an existing Private Sector representative, namely the LEP Diversity Champion and a local authority representative, namely the Chair of the Business, Economy and Innovation Committee and supported by the Chief Executive.
- 2.5 In total 33 applications were received of which 20 female (61%), 13 male (39%) and 16 BAME (48%). Of these, 10 candidates met with the Appointments Panel of which 3 male (30%), 7 female (70%) and 4 BAME (40%).
- 2.6 As the meetings of this Appointments Panel took place after the publication of the agenda for this meeting, the outcome of that recruitment exercise is not known at the time of publication of this Agenda, and this will be reported to the Combined Authority as part of the presentation of this item.

### **Nominations to Combined Authority committees**

- 2.7 At present there are a number of vacancies on several of the Combined Authority's Committees, including Deputy Chair vacancies which are currently nominated from the existing private sector membership of the LEP Board. Following the appointment of new LEP Board members, it is anticipated that proposals will be brought forward to the Combined Authority at its meeting on 7 September to make appropriate appointments to its committees.

## **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 All members of the LEP Board will be expected to promote the cause of inclusive growth.

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

- 5.1 The ambition is for the LEP Board to reflect the diverse communities, business and geography of West Yorkshire. The diversity of the applicants is set out in paragraph 2.5.

## **6. Financial Implications**

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

**7. Legal Implications**

7.1 None as a consequence of 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 Combined Authority notes the update provided at the meeting on the process to seek new private sector members for the LEP Board.

**11. Background Documents**

There are no background documents referenced in this report.

**12. Appendices**

None

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**Report to:** West Yorkshire Combined Authority

**Date:** 27 July 2023

**Subject:** **Minutes for Information**

**Director:** Alan Reiss, Chief Operating Officer

**Author:** Ian Parr, Governance 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 and panels, 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](#):

- Culture, Heritage and Sport Committee held on 26 January 2023.
- Climate, Energy and Environment Committee held on 21 March 2023.
- Governance and Audit Committee held on 22 March 2023.
- Employment and Skills Committee held on 23 March 2023.
- Business, Economy and Innovation Committee held on 29 March 2023.
- Transport Committee held on 26 May 2023.

## 3. Tackling the Climate Emergency Implications

- 3.1 There are no 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 and panels be noted.

## **11. Background Documents**

There are no background documents referenced in this report.

## **12. Appendices**

None.