

Levelling Up Fund Application Form

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

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

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

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

One application form should be completed per bid.

Applicant & Bid Information

Local authority name / Applicant name(s)*: [Monmouthshire County Council](#)

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

Bid Manager Name and position: [Roger Hoggins, Head of Strategic Projects,](#)

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

Contact telephone number: [07767246138](#) **Email address:**
rogerhoggins@monmouthshire.gov.uk

Postal address: [County Hall, The Rhadyr, Usk, Monmouthshire NP15 1GA](#)

Nominated Local Authority Single Point of Contact: [Roger Hoggins](#)

Senior Responsible Officer contact details: [Frances O'Brien](#)

Chief Finance Officer contact details: [Peter Davies](#)

Country:

☐ England

☐ Scotland

☒ **Wales**

☐ **Northern Ireland**

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

Chris Jones Regeneration

Arup

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

☐ Northern Ireland Executive

☐ Third Sector

☐ Public Sector Body

☐ Private Sector

☐ District Council

Other (please state)

PART 1 GATEWAY CRITERIA

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

1a Gateway Criteria for **all** bids

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

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

☒ Yes

☐ No

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

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

☐ Yes

☐ No

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

PART 2 EQUALITY AND DIVERSITY ANALYSIS

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

This package approach of three projects is about ensuring Caldicot is a 21 century place that is accessible and inclusive to all, addressing barriers and opening up opportunities. The projects have been subject to an Equality and Future Generations Evaluation process.

Protected Characteristics	Response
Age	The projects have been developed through consultation with the public, residents on respective roads and in consultation with local elected members, businesses and local organisations to create an accessible and inclusive series of streets and town centre environment. The enhanced leisure offer will meet the needs of all age cohorts and the repurposed retail block will consider an offer that is diverse to all ages and needs. The projects will benefit all ages and will foster neighbourliness and belonging across Caldicot.
Disability	The projects aim to improve accessibility and connectivity for all with the adoption of low traffic neighbourhoods across the proposed east to west axis. Dropped kerbs, tactile paving and wider pavements will present an enhanced environment for those that have a physical or visual impairment. At level pedestrian tables will reduce vehicle speeds and give priorities for pedestrians, wheelchair users and disability scooters, amongst others.
Gender reassignment	No impact
Marriage or civil partnership	No impact
Pregnancy or maternity	Greater connectivity and improved access to health, local services and other needs is key to those people that are pregnant or with young babies/children, with the projects to increase mobility, thereby breaking down barriers and encouraging community cohesion.
Race	No impact
Religion or Belief	No impact
Sex	No impact
Sexual Orientation	No impact
Welsh Language	No Impact

Poverty	Caldicot has pockets of social deprivation amongst a number of neighbourhoods and streets. This proposal is working towards an integrated network of paths and routes that opens up opportunities for those in low income and reduced mobility with the Caldicot cluster of AT proposals linking in routes that have access to health, employment, leisure, local services and education.
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In reviewing our specific projects we have the following responses on how design should respond to specific needs:

Repurpose Retail Block

The planned refurbishment and remedial work to Nos 7-43 Newport will consider accessibility and meeting DDA requirements from within the public realm into the respective units. Improvements to upper floor residential dwellings, where feasible will also consider accessibility needs.

Connections Project

This Active Travel project will meet design standards for low traffic neighbourhoods, adoption of quiet street principles and accessible public realm. Linking into public transport will be key with bus platforms being accessible to all.

Leisure & Well-being Centre

Internal improvements and new facilities will consider all user needs in terms of gender, age, disability, race, religion, gender reassignment, amongst other characteristics. The internal design, fit out and organisation of the building will consider specific user needs, specifically their movement through the building and their experiences at the point of the activity. The external landscape, paths/routes, parking will be considered as part of the arrival and entrance into the building.

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

Please specify the weblink where this bid will be published:

<https://www.monmouthshire.gov.uk/levelling-up-fund/>

PART 3 BID SUMMARY

3a Please specify the type of bid you are submitting

☐ Single Bid (one project)

☒ Package Bid (up to 3 multiple complimentary projects)

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

The focus of this LUF bid is to enhance and bring together a number of key physical assets that creates a coherent identity and increased economic well-being for Caldicot using a string of integrated transport activities that presents it as an accessible place for all. This in turn will lead to local economic and social benefits as well as maximising its role at a key strategic entrance into South East Wales.

The strategic direction and role and function of the town going forward is centred on a Vision that is *“Caldicot - A Connected Community for Residents and Visitors with Wellbeing at its heart” A place for living, well-being, trade, enterprise and learning and is connected into its neighbourhoods and the Living Levels.*

Our proposed projects are centred around all the LUF thematic priorities.

Transport has a strategic and local focus with the location of Caldicot alongside the A48 and the main Swansea to London trainline being seen as of high regional importance. There is a local need to improve accessibility and mobility across the town to narrow the gap between those economically active and those that face barriers to work, health, community, and other activities.

Regeneration activity has been delivered over the last 3 years with a Vision, Action Plan Framework and detailed design development focussed on making linkages with neighbourhoods with a focus now on the core town centre with its dated public realm and tired 1960s retail block, rear parking and service yard space.

Culture and Heritage sit on the edge of the town centre providing an important daily resource for local residents as well as drawing in visitors. Regeneration plans also recognise the nearby attractors of leisure, play, heritage, and culture which includes the town's leisure centre and a number of community venues that sits on the edge of the town centre.

The specific project activity centres on:

Repurposing Retail Block

The project proposal is to acquire and refurbish the retail and residential units comprising Units 7-43 (inclusive) Newport Road which is located in the primary core of the town centre. The aim is to re-purpose and provide a high quality and attractive development at the heart of the town centre.



An Active Travel Connections Project

This project proposal would provide an active travel corridor from the east of the town, through the town centre and onwards to Newport Rd (West) with future linkages to the mainline rail station at Severn Tunnel Junction. This will include low traffic neighbourhoods, accessible public realm and integration with public transport hubs.



Leisure & Well Being Centre

For this project, one of the objectives is to improve health and wellbeing and grow participation in regular physical activity. The proposals include an extension of the fitness suite, new changing village, improvements to the pool area including a steam room and sauna, enhanced pool viewing and delivery of a soft play and café facility. External improvements such as outdoor changing facilities, purpose built 2 court squash facility and replacement of the skatepark.



3c Please set out the value of capital grant being requested from UK Government (UKG) (£). This should align with the financial case:		£14,777,569
3d Please specify the proportion of funding requested for each of the Fund's three investment themes	Regeneration and town centre	24%
	Cultural	48%
	Transport	28%

PART 4 STRATEGIC FIT

4.1 Member of Parliament Endorsement (GB Only)

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

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

☒ Yes

☐ No

See attached.

4.2 Stakeholder Engagement and Support

See technical note Table 1 for further guidance.

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

A place-based approach to the regeneration of Caldicot town became more of a focus in 2016 when a town centre masterplan was led by Caldicot Town Team and Monmouthshire County Council. This process evolved with a Town Centre Vision and Action Plan Framework developed in 2018 and adopted as well as individual projects being developed and implemented over the last two years.

At a strategic level, the whole community has engaged and participated in identifying the needs and shaping the priorities for its 15-year vision and set of proposals. In 2018, this involved a number of community drop-in sessions and exhibitions. At the same time, a town centre stakeholder forum was established which has augmented the work of Caldicot Town Team, a local Community Interest Company. The forum is a cross sector partnership of Caldicot Town Council, Caldicot Town Team, the local events committee, local ward members and other groups with the forum serviced by regeneration and town engagement officers at the County Council.

Since the adoption of the Town Centre Vision and Action Plan framework in 2018, there have been a number of projects that have been subject to consultation and engagement and subsequent implementation such as the Cross Destination Space and phase 1 of Church Road. These provide a strong foundation for the proposed LUF projects that are proposed within this submission. Specific activities include:

Repurposing Retail Block

Since 2017, the viability of the town centre has been a major focus for the local community with the retail block at nos 7-43 Newport Rd identified as being critical due to its visibility, lack of investment and not meeting the town's potential. Community engagement on this town centre property asset has involved:



- The 2017 town masterplan exercise involved a number of open drop in sessions for the community leading to an exhibition within an empty shop;
- During 2019-20 a number of town stakeholder workshop sessions;
- In January and March 2021, the importance of the retail block was discussed as part of the public realm project consultation.

Connections Project

This project has been subject to a number of focused engagement activities, being:

- March 2020 to July 2020 – neighbourhood, community and stakeholder consultation that due to Covid-19 was mainly digital through web-based plans, online surveys and some targeted door to door conversations along Church Road.
- January to March 2021, a number of community engagement sessions were held which included the use of an empty shop as a static display, use of web-based material and online surveys, community webinars and use of VR images that could be accessed through on-street QR codes.



Leisure and Well-Being Hub

This project has been subject to a number of focused engagement activities, being:

- Public consultation, Cabinet and council papers.
- 758 responses to a community survey on the proposals
- Digital consultation via web portal.
- Town and Community Council
- Individual County Council Members
- Separate meetings with local interest groups

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

Connections Project

Active travel, specifically the development of low traffic neighbourhoods does present challenges in relation to behavioural change and the move from roads to streets which the County Council will need to manage in terms of its strategic messages on climate change and sustainable communities.

Leisure & Well-being Hub

The initial proposals received opposition from the local Squash Club and its members due to the fact that the squash facilities were due to be removed as part of the chosen proposal. A petition was received with a total of 324 signatures and as a result detailed squash questions were included in our online consultation. The proposal listed in this application included a purpose built 2 court squash facility complete with changing.

4.2c Where the bidding local authority does not have the statutory responsibility for the delivery of projects, have you appended a letter from the responsible authority or body confirming their support?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> N/A
For Northern Ireland transport bids, have you appended a letter of support from the relevant district council	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
4.3 The Case for Investment See technical note Table 1 for further guidance.	
4.3a Please provide evidence of the local challenges/barriers to growth and context that the bid is seeking to respond to. (Limit 500 words)	
<p>Whilst Monmouthshire is the second most competitive authority in Wales, in the last 15 years it has performed below its full potential; it has a small scale, dual economy when compared to others in the Cardiff Capital Region, whereby the occupational profile of residents is skewed towards high skill occupations with resident earnings higher than workplace earnings; its working age population is low in relation to comparators, with a median age of 48 (the oldest in the region). The county is therefore not currently geared towards strong economic growth which if unchanged, will result in the future economic inactivity rate growing. Monmouthshire therefore has an economic imperative to address these issues by unlocking the new opportunities in the southeast Severnside area where Caldicot is located, its largest area of urban population (circa 20,000).</p> <p>LUF offers the opportunity for the region to capitalise on Monmouthshire's new opportunities whilst also addressing further strategic regeneration priorities throughout the County. Our LUF focus complements the regional ambitions in the following way:</p> <ul style="list-style-type: none"> ▪ <u>Prosperity and Opportunity</u> – enabling a more productive local economy in Caldicot that is reaching out in terms of connectivity. ▪ <u>Inclusion and Equality</u> - a vibrant and sustainable economy which contributes to the well-being and quality of life of the people in Caldicot, now and in the future. ▪ <u>Identity, Culture, Community and Sustainability</u> – creating a more coherent identity and reputation as a strategic hub in South East Wales. <p>Economically, the town centre is not fit for purpose to meet the needs of future residents with its offer and range of facilities dated and lacking diversity. This is shown in the town vacancy rate of 20% in primary frontages. Although there has been a rise in the service sector, the town centre's infrastructure is not of the right quality to meet the future needs of retail, food and drink, housing, enterprise, and other activities. The Covid pandemic has accelerated the shock impacts to UK's High Streets with Caldicot requiring significant re-purposing and investment if it is to meet the need of its diverse local community.</p>	

The place is also showing us evidence of a mixed community with those that mobile and connected and those that have a limited set of life chances and outlook with lower skills, employment benefit claimants and a on waiting list for a home.

Figure 1 - Key Challenges Facing Caldicot

Key Challenges



20% vacancy in town centre primary shopping frontages



35% reduction in pedestrian footfall over 5 years



Lower percentage of people with higher qualifications than Welsh average



Higher percentage of people on employment benefits than the Welsh average



733 people on the waiting list for a home in Caldicot



396 people need a home for a single person



18.5% of people don't own or have access to a car (4.5% lower than Welsh average)



Higher percentage of people that are retired live in Caldicot (18% compared to Welsh average)

Source: Various – Monmouthshire Housing Data; Understanding Welsh Places; Monmouthshire Annual Retail Survey

On reflecting where Caldicot is as a place now and importantly as we emerge from the Covid-19 pandemic, the locality and sense of place that is Caldicot is even more so important as we have stayed local, used local shops and services (when open), and appreciated what we have locally. We also appreciate what is within our reach outside of peoples' hometown with the need for connectivity with our neighbouring towns and cities that provide additional facilities such as hospitals, colleges, and other key services. There is therefore a fusion of regional and local aims and objectives for Caldicot.

Figure 2 - Caldicot - A Spatial Plan



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

Caldicot has a mixed demographic with those members of the community who are less economically active and mobile, and those that due to their travel to work patterns have greater choice in other towns and places. This has resulted in the leakage of activity and has led to lower market demand and commercial confidence in the town centre offer.

In analysing the market failure closer, the physical condition of this town centre property is very poor which is reflected in Nos 7-43 Newport Road. In single ownership, with affordability for occupiers being a key challenge, intermittent service charge collections have led to buildings fallen into steady decline and disrepair. The cost of repairing the premises will be too expensive for most occupiers and it is likely that most would leave if a full charge was imposed. Discussions with the landlord


has concluded that a refurbishment scheme would not be commercially viable and there would be no effective return on their new investment. There is therefore a case for the public sector to intervene and meet the gap in the market in terms of the capital cost of acquisition and refurbishment.


The public realm and connections element of this LUF bid would also support the newly refurbished commercial space with it enhancing and support the attraction of new, higher quality occupiers.


The town therefore has the opportunity to realise its strategic position in relation to its role and function and transport infrastructure.

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

This package bid a series of inter-related capital projects:

Project	Repurposing Retail Block
<p>The investment activity is about:</p> <ul style="list-style-type: none"> ▪ Construction of new shop-fronts and associated signage; ▪ Refurbishment of the ground floor retail units to provide new high quality commercial space; ▪ Refurbish the residential upper floors to provide high quality accommodation; Enhanced immediate public realm and green infrastructure, that serves the properties and the adjoining areas. 	
Challenges & Barriers	
<p>The town centre is underperforming and not meeting local needs with this retail block contributing to approximately 33% of the town's offer.</p>	
<p>There are currently three vacancies within the parade, including the largest unit (8,450ft²) which was vacated by Store 21.</p>	
<p>The landlord has not been proactive in managing the asset with its condition deteriorating and mix of uses not effectively curated in terms of use.</p>	
Evidence	
<ul style="list-style-type: none"> ▪ County Council annual retail surveys demonstrating low rates of performance; ▪ Physical condition of retail block and differing tenant aspirations. 	

Project	Connections Project	
The investment activity is about:	<ul style="list-style-type: none">▪ Developing a low traffic neighbourhood environment that encourages cycling and walking and promotes active travel;▪ Creation of a town centre public realm environment that is accessible, functional, enterprising and event based;▪ Adopting an integrated place based design to active travel that includes green infrastructure, local biodiversity, sustainable urban drainage and other place based principles.	
Challenges & Barriers		
<p>There is a need to provide a more direct, accessible and appealing active travel corridor that forms an east-west axis across the town as current trip patterns are short, car based and not contributing to cohesive community activity nor having a direct relationship to the town centre offer.</p> <p>Barriers include traffic dominated environments, no legible or direct routes to public transport hub and residents experiencing poor environmental quality and well-being.</p>		
Evidence		
<ul style="list-style-type: none">▪ ATC counts and traffic surveys on Church Road and Newport Road (west);▪ WHCAR studies on Church Road and Newport Road (west);▪ Town centre public realm analysis..		

Project	Leisure and Well-being Hub	
<p>The investment activity is about:</p> <ul style="list-style-type: none"> ▪ External enhancement of building; ▪ Extended fitness offer with toning suite, spin and fitness studios; ▪ Village style changing facilities; ▪ Soft play and café facilities; ▪ Improvements to the Pool area with enhanced viewing; ▪ Purpose built 2 squash court facility ▪ Provide outside changing area to maximise usage of the 3G and other pitches; ▪ Replacement of the skatepark. 		
Challenges & Barriers		
<p>Whilst Caldicot's health profile is better than that of Monmouthshire's profile of physical activity only 62% of adults meet the physical activity guidelines and 43% of working age adults have a healthy weight.</p> <p>The population of Caldicot is in the region of 9k, however with the large town centre regeneration is projected to double to 20k. There is a latent demand for fitness of 457 members that will grow by a further 300 members as the population grows.</p>		
Evidence		
<ul style="list-style-type: none"> ▪ Caldicot Leisure Centre Feasibility Study, Max Associates – September 2019 ▪ Five Year Usage Profile and Latent demand analysis – September 2019 		
4.3d For Transport Bids: Have you provided an Option Assessment Report (OAR)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
<p>4.3e Please explain how you will deliver the outputs and confirm how results are likely to flow from the interventions. This should be demonstrated through a well-evidenced <i>Theory of Change</i>. Further guidance on producing a Theory of Change can be found within HM Treasury's Magenta Book (page 24, section 2.2.1) and MHCLG's appraisal guidance. (Limit 500 words)</p>		

Our approach to how we are to monitor and evaluate outputs and outcomes is outlined in more detail further on in this document.

Inputs. Some of these are already established and operational in relation to project team staff, town centre forums and communication structures and resources. The LUF will lever in other funds from Welsh Government and the County Council. These will be organised into a common monitoring evaluation framework that will track expenditure to the respective activities and outputs.

Outputs. Across the three thematic project areas, physical monitoring supported by survey work will provide evidence and qualify the respective outputs by project. Physical and financial claims will work with interim and final milestones.

Outcomes. These will happen post-delivery and will require extended quantitative and qualitative survey work to understand attribution of outcomes to project activity.

Inputs	Activities	Outputs	Outcomes	Impacts
County Council project team	Nos 7-43 Newport Rd			
Local Governance & Stakeholder Structures	<ul style="list-style-type: none"> External refurbishment Internal shell level fit Home's improvements 	<ul style="list-style-type: none"> Remediation and refurbishment of a key dilapidated town centre building Delivery of quality commercial and residential space within the primary town centre core 	<ul style="list-style-type: none"> Increased footfall – day and eve Extended dwell and linked activities Enhanced user satisfaction levels Increased loyalty and return trips Increase in land values 	Local Prosperity – opening up opportunities for local and regional enterprise and building a sense of place
Informed & Shaped by Community Need	<ul style="list-style-type: none"> Rear boundary and service yard improvements Immediate public realm 	<ul style="list-style-type: none"> Delivery of enhanced rear service yard space Delivery of immediate public realm setting 		
£xx of LUF funding				
£xx of WG funding				
£xx of MCC funding				
Local networking & partnership working				

	Connections Project			
	<ul style="list-style-type: none"> ▪ Delivery of low traffic neighbourhoods ▪ Delivery of an Active Travel corridor ▪ Provision of mini hubs for cycle storage ▪ Linking into public transport 	<ul style="list-style-type: none"> ▪ Upgraded road infrastructure to meet active travel needs ▪ New or upgraded cycle or walking paths ▪ Wider cycling infrastructure 	<ul style="list-style-type: none"> ▪ Impact of scheme on travel demand ▪ Reduced journey times and improved journey reliability ▪ Local economic benefits to town centre and other Caldicot businesses ▪ Reduced transport carbon emissions ▪ Improved air quality ▪ Improved health and well-being ▪ Improved bio-diversity 	Connected Community – a place that is inclusive, mobile and sustainable and is a hub to explore from
	Leisure & Well-Being Hub			
	<ul style="list-style-type: none"> ▪ Refurbished and extended leisure centre ▪ New outdoor leisure offer ▪ Extended active travel links to town centre 	<ul style="list-style-type: none"> ▪ Upgraded sports facility ▪ Enhanced public space and links to outdoor activities ▪ Linked activity between leisure centre hub and town centre ▪ A leisure facility aligned with the Sport Wales Strategy of wanting “Wales to be an 	<ul style="list-style-type: none"> ▪ Improved sports offer that is more visible and easier for residents/visitors to access ▪ Enhanced user satisfaction levels ▪ Increased monthly and annual member ▪ Improved health and well-being ▪ Increased town wide economic and social activity 	Cohesive and Healthy – smart integration of assets that provides a good quality of life for all

		active nation with as many people as possible inspired to be active through sport"		

4.4 Alignment with the local and national context

See technical note Table 1 for further guidance.

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

National/Regional

Cardiff Capital Region Regeneration Plan

CCR's vision is for "*A Prosperous Capital City-Region for Wales*" — *a decision making centre, a global gateway for capital, trade, and visitors, a knowledge hub and a major population centre and business cluster for Wales.*

Its approach to investment and levelling up is centred on ensuring that the Strategic Hubs and Cities provide and receive the maximum economic benefit from a complementary relationship. It supports the different and distinctive roles of strategic hubs and build on their key strengths to provide a diverse range of complementary employment opportunities.

Well-Being of Future Generations Act

Monmouthshire County Council (MCC) contributes to the seven national objectives through its five Organisational Goals (2017-2022). All five contribute to this objective:

- The best possible start in life
- Lifelong well-being
- Maximise the potential of the natural and built environment
- Thriving and well-connected county
- Future-focused Council – including providing good sustainable local services whilst delivering excellent customer experience.

Local

Monmouthshire Corporate Plan

The Plan is in line with the goals and ambitions of our partners in other public services such as the NHS, Police, Public Health, housing associations and the Fire and Rescue Service. These and many more organisations are part of the Monmouthshire Public Service Board (PSB). Priorities that are relevant to this submission are:

- Social Justice - a fair and equal society, respecting and upholding diversity within our communities, addressing child poverty and worklessness
- Enterprise & Job creation - capitalise on the Cardiff Capital Region City Deal and reducing bridge tolls to unlock opportunity and drive economic growth so that productivity becomes a lever for increased prosperity
- Locally Accessible Services – maintaining a local service offer and enhancing our leisure and recreation provision
- The provision of quality housing, including affordable housing, to meet the needs of our communities and to address the needs of our changing demography.

Monmouthshire's Replacement Local Development Plan

Monmouthshire County Council is preparing a Replacement Local Development Plan (RLDP) for the period from 2018 to 2033. The RLDP will allocate land for development, designate areas for protection and contain policies to provide the

basis for decisions on planning applications. Its Growth and Spatial Options and Preferred Strategy is recommending a Population-Led approach (Option 5) as it would:

- Provide a level of growth that will help to deliver the Council's core purpose of building sustainable and resilient communities for current and future generations.
- Provide a wide choice of homes and secure a significant level of affordable homes.
- Assist in ensuring communities have a balanced population and are socially sustainable.
- Result in an increase in the working age population group, which would support job growth within the County.

It is also in favour of spatial option that “Distribute Growth Proportionately across the County's most Sustainable Settlements” which in the case of Caldicot would help with direct job growth to sustainable locations across the County, which will assist in reducing the need to out-commute and promote self-contained communities.

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

The Church Road and Newport Road West schemes are both designed so as to encourage a shift away from the usage of motor vehicles and incentivise active travel such as walking and cycling.

In particular, the Newport Road West scheme will see the layout of the highway changed such that through trips are no longer possible and a standardised footway provided along both sides of the road. This will make pedestrians much more of a focus than they are at present. There are currently almost 3,000 vehicle movements a day on Newport Road West; this is forecast to decrease to around 1,400 when the scheme is implemented. Some of the displaced vehicles will switch to alternative routes, but there is a real opportunity to encourage active travel for shorter trips by giving more priority to pedestrians/cyclists and improving the local public realm. The resulting mode shift will contribute to the Government's target to achieve net zero carbon emissions as well as improving local air quality for residents.

Both of the transport schemes will make a strong contribution to environmental targets not only by reducing vehicle trips, but also through creating a fundamental 'greening' of the highway. The proposed measures include tree planting and the introduction of sustainable urban drainage systems (SuDS) helping to filter pollution and improve wellbeing. Collectively these measures will reduce carbon emissions, improve air quality and contribute towards environmental targets.

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

WG TRI

The Targeted Regeneration Investment (TRI) programme made available £100m of funding across Wales from 2018-21, to support projects that promoted economic regeneration with activities focussed at individuals and areas most in need while serving the aims of wider sustainable development. Caldicot was identified as the priority regeneration area for Monmouthshire.

WG Transforming Towns

Transforming Towns was launched in January 2020 to address the decline in town and city centres and the reduced demand for high street retail. The focus of the Programme is sustainable growth of our towns and cities, and their transformation into places of living, working, learning and leisure. Projects funded by the Transforming Towns Programme will be located in town and city centres, will typically focus on the built environment, and might include interventions such as the refurbishment and repurposing of empty and derelict buildings; new build projects; improving biodiversity through green infrastructure; and improvements to public spaces.

WG Active Travel

The Active Travel (Wales) Act aims to make it easier for people to walk and cycle in Wales, specifically to promote walking and cycling as viable modes of transport for everyday journeys such as to the shops, work or college. It places a legal duty upon local authorities in Wales to map, plan for and promote active travel journeys. The County Council has a cluster of Caldicot projects that have been presented in framework of future project activities.

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

The Church Road and Newport Road West projects include a range of proposals designed to deliver or improve cycle and walking infrastructure, including:

- Widened footways in strategic locations and along pedestrian desire lines
- Widened pedestrian crossing areas with improved visibility, spillout space, dropped kerbs and tactile paving
- Enhanced pedestrian link to existing park and playing field behind Newport Road West
- A footway along southern edge of Newport Road West where presently there is none

All designs are developed in accordance with Design Guidance - Active Travel (Wales) Act 2013 (December 2014). The County Council wishes to encourage people to leave their cars behind and use active travel where it is suitable for them to do so. It does this by:

- Producing maps of existing active travel routes and related facilities in a local authority's area;
- Producing maps of new and improved active travel routes and related facilities that are needed to create integrated networks for active travel in a local authority's area;
- Having regard to integrated network maps in preparing transport policies and ensuring that there are new and improved active travel routes and related facilities;
- Taking reasonable steps to enhance the provision made for walkers and cyclists; and
- Promoting active travel journeys and securing new and improved active travel routes and related facilities.

The Connections project has been developed and designed in accordance with this Design Guidance with specific consultation with Sustrans.

PART 5 VALUE FOR MONEY

5.1 Appropriateness of data sources and evidence

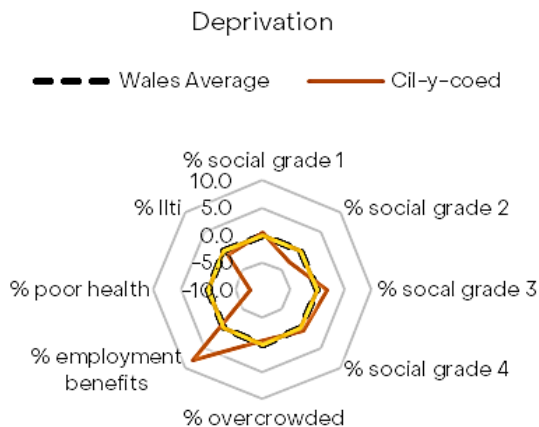
See technical note Annex B and Table 1 for further guidance.

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

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

Caldicot has developed from a small railway centred village, expanding with the demands of the steel workforce at Llanwern, with it today playing an important role as the gateway to Wales on the M4 and rail system. Substantial recent development has occurred in Caldicot, Magor and surrounding towns. Caldicot and Magor have significant employment bases, although they also have the characteristics of a 'dormitory' area with high amounts of out-commuting. Whilst new homeowners see the opportunity in Caldicot as a place to live due to its strategic location, the previous links to steel and manufacturing have left some parts of the community being less economically active and mobile with the town presenting a mixed demographic with some groupings in the community.

Figure 3 - Caldicot - Deprivation Indices



- Older than the Welsh average for 65-75 plus cohorts which places pressure on local services;
- Seeing younger people leave the town, with those aged 16-24 less than the Welsh average;
- Higher than the Welsh average for people, married with children;
- Low for self-employment with less of an entrepreneurial culture;
- Reliant on employment in wholesale retail and vehicle repair which is a risk in terms of long term dependency on this sector;
- Less people with Level 4 qualifications (HNC and above) than the Welsh average;
- A place where there is more socially rented housing than the Welsh average;
- A place where there are more people accessing employment benefits and do not own a car.

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

Regeneration

The main source of data for our town centre based project is the County Council's Local Development Plan – Annual Retail Background Paper. This data is collected on an annual basis and is in accordance with Planning Guidance (Wales) Technical Advice Note 4, Retail and Commercial Development and includes:

- The Diversity of Uses by the measurement of the diversity of town centre uses as an analysis of the number of comparison, convenience and service outlets and their floorspace.
- Retailer Representation, Demand and Intentions to Change.
- The Proportion of Vacant Street Level Property. A survey of the number of vacant ground floor properties in the Central Shopping Area of Caldicot is undertaken on an annual basis, the Council has conducted more than fifteen such surveys.
- Pedestrian Flow is the measurement of the number of movements of people on the streets, in different parts of the centre at different times of the day, and changes over time.
- Accessibility. The ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking, the availability of public transport services and the quality of provision for pedestrians and cyclists.
- Customer Views and Shopping Patterns. Regular surveys of customer views, including their stated preferences for where they shop for certain goods, assist authorities in monitoring and evaluating the effectiveness of town centre improvements and of town centre management.

WHCAR Transport Reports

A number of Walking Cycling and Horse Riding Assessment (WCHR) has been compiled in accordance with DMRB HD 42/17. The purpose of the WCHR is to facilitate inclusion of walking, cycling and horse riding modes into the highway scheme design process from an early stage. This enables the identification of opportunities for improved facilities and integration with the local (and national) networks where applicable. These have been applied for the Connections Project and can be made available on request.

Leisure Baseline Data

An estimate of latent demand for health & fitness within Caldicot has been undertaken which shows that 55% live within 1 mile of the centre, rising to 78% within 3-miles. Within the 3 miles this area is home to 15,158 adults aged 15+ (over 18k people in total). This catchment includes those in Caldicot, Rogiet, Portskewett, Caerwent plus some of those in Magor. 78% of current members live within a 3-mile radius. Just over 42% of the population are aged 50+ with a

quarter of all people are described as Rural Reality (Mosaic group D) and these are a mix of families, mature couples and older singles with moderate incomes.

We have estimated the overall demand for fitness at Caldicot Leisure Centre to be 1,507 – this is the total number of members we feel could be achieved, once the developments have taken place. It also includes allowance for new housing in the area. We understand that in the next 5 – 7 years, it's estimated that there will be a population increase of c. 20,000 due to new housing.

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

Regeneration

Retail Survey. The data collected within the town centre collects and tracks the performance of the town centre and has done so for the last ten to twenty years. The range of data is a mixture of quantitative and qualitative types that will assess the impact of the interventions once implemented and to understand the level of attribution from the investment within the town centre economy and beyond.

Transport

Transport assessments. The data collected by the respective WHCARs, ATCs and other transport data provides a baseline position for Caldicot now. It specifically shows the current transport use by modal split including type, volume, direction, speed and behaviour that can be consistently collected on completion of the Connections (active travel) project, so that we can understand the changes in travel behaviour, journey times as well as user satisfaction. Passenger data from bus and rail also provides a baseline position that can be referred to at completion of the works and repeated once the construction phase has finished and there is a clean and uninterrupted environment to assess.

Heritage/Culture

The leisure data is customer based and illustrates the reach of the existing and future users within the Caldicot town catchment. It is also relevant in terms of understanding the specific segment of use and their leisure needs, so that the activities and experiences meet this demand. Our targeted and innovative approach ensures delivery of provision to meet local regional and national trends.

5.2 Effectiveness of proposal in addressing problems

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

A range of assumptions have been used to demonstrate how proposals will address any existing or future problems. The assumptions are designed to ensure that the value for money assessment is as robust as possible.

The following assumptions have been used to understand how proposals will address the key issues identified:

- Use of the TAG Active Modes Appraisal Toolkit (AMAT) for the calculation of benefits generated from the active travel interventions proposed as part of the Connections project. All assumptions that have been used within the AMAT Toolkit have been established in line with the industry guidance.
- DfT's Small Scheme Appraisal Toolkit has also been used to estimate the impact of highway users as a result of the proposed interventions. All assumptions used within the toolkit have been applied in line with guidance and standard industry practice.
- A fully sourced set of assumptions, based on values from the, TAG databook, Green Book and DCLG guidance and DCMS guidance wherever possible (such as Land Value Uplift, willingness to pay, active travel benefits and health benefits). Where such guidance is unavailable for a specific indicator or assumptions, other recognised industry or academic literature and studies have been used appropriately. For instance, wider land value uplift has been calculated using methodology based on the approach adopted for the Future High Street Fund through the clarification process.

This approach has enabled a range of benefits to be quantified and valued ranging from active travel benefits and public realm benefits resulting from the Connections project as well as health benefits associated with additional demand generated through improvements to the Caldicot Leisure Centre and land value uplift associated with the regeneration of Newport Road.

The methodology and assumptions have been selected based on their appropriateness for the level of investment of the schemes and the information available at the time of writing. For more details, see Appendix 6-9.

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

As outlined in the response above, benefit estimation across the range of interventions has been developed using the most robust methodology possible through the use of reliable and official data set out in government guidance or data that has been sourced from reliable academic research and studies. These provide an appropriate level of detail and are sufficient to demonstrate the scale and significance of projects.

The quantified benefits and costs of the proposed schemes are presented in base year 2021 real prices (adjusted for inflation) and discounted to appraisal year 2021 using a discount factor of 3.5% a year, as recommended by the HM Treasury's Green Book guidance and LUF guidance.

All benefits have been assessed through a robust economic model and benefits have been appraised over the appropriate timescales (30 years for public realm

and wider benefits based on Greenbook guidance and 20 years for active travel / 60 years for highways based on TAG guidance and the toolkits used).

It should be noted that potential highway disbenefits relating to re-routing of traffic (using the relocated car park for the Church Road scheme, and re-routing after through traffic is prevented for the Newport Road West scheme) have not been modelled and are not included. However, in the case of Newport Road West it is considered to be likely that through trips will use the parallel Woodstock Way as an alternative, and an assessment commissioned by the Council concluded that this would not have a severe impact on highway safety or capacity, thus any disbenefits should be minimal.

In order to ensure that benefits have been estimated accurately, specifically for land value uplift calculations a series of assumptions has been made around additionality. To account for additionality within the calculations, assumptions for the level of deadweight and displacement have been made in line with the HCA's Additionality Guide. Deadweight refers to the level of benefits that would have been realised without government interventions and displacement refers to the level of benefit that will be transferred from one area to the area where the interventions are being delivered. Once additionality has been considered, the net additional impacts can be ascertained.

5.3 Economic costs of proposal

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

Scheme Element	Present Value Costs (2021 prices) £'s
Leisure Centre	£ 8,497,183
7-43 Newport Road	£ 6,503,361
Newport Road West (Active Travel)	£2,613,424
Church Road (Active Travel)	£1,355,513
Public Realm Improvements (Newport Road)	£2,039,304

All scheme costs have been based on the cost figures that are presented within Section 6 of this application form. The following assumptions have been applied;

- Changed to real terms using 2021 as a base year
- Discounted using the standard rates set out in the government's Green Book Guidance.

Optimism Bias has been applied to all scheme interventions, based on the level of scheme development and in line with optimism bias rates in accordance with Green Book guidance and standard practice.

All works estimates associated with active travel improvements include Optimism Bias at 20%; this falls within the range of 3-44% that is recommended in TAG Unit A1.2 for road projects and is considered to be appropriate at this stage of project development.

For the Newport Road and Leisure Centre proposals, the first step was to identify the appropriate project type by considering the characteristics of the scheme; this was deemed to be “standard buildings” in line with the Green Book definition. The recommended adjustment range for standard buildings is 2% (lower) to 24% (upper). The starting point is therefore the upper boundary of 24%. To reduce this upper bound OB, we have identified the key contributing factors and assigned a mitigation factor to each of them. As this can be a subjective, mostly qualitative exercise, we have assigned a score of 1.0 to contributory factors that are fully mitigated, 0.5 to those which are partially mitigated. The key OB contributing factors, their contribution to the upper bound OB (values taken from the Green Book OB guidance), the mitigation factors applied to them and the justification are provided below.

OB contributing factor	% contribution to upper bound OB	Mitigation factor	Justification
Poor contractor / developer capabilities	9%	1.0	MCC has a proven track record in the successful delivery of similar schemes. Further information on MCC's track record can be found in Appendices
Design Complexity	1%	1.0	No design complexities have been identified for this scheme.
Degree of Innovation	4%	1.0	There are no unusual site conditions requiring innovative solutions.
Poor project intelligence	2%	1.0	Detailed research has been undertaken to ensure the business case is based on a robust understanding of the current local context, market failure, and property market characteristics.
Public relations	2%	1.0	The scheme enjoys strong support from the local community.

Based on the above, OB was reduced from 24% by 18%, resulting in an OB value of 20%. The calculation is as follows:

Managed OB contribution = Reduction in OB = 9 + 1 + 4 + 2 + 2 = 18%

*Resultant OB = (100% - 18%) * 24% = 20%*

Due to the application of Optimism Bias for the value for money assessment, scheme costs presented in this analysis are above £20m. The LUF ask remains at £20m.

5.4 Analysis of monetised costs and benefits

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

In accordance with MHCLG's Levelling Up Fund Business Case Guidance, the central benefit-cost ratio (BCR) which demonstrates the value for money of the scheme should be based on LVU and the valuation of transport-related benefits (in accordance with WebTAG guidance), air quality, crime, environmental, greenhouse gas emissions, and amenity values. As the proposed scheme includes transport improvements, regeneration and public realm improvement, the central BCR is based purely on transport benefits and land value uplift as well as wider benefits associated with the improvements.

The proposed scheme is made up of three elements: regeneration of Nos 7-43 Newport Road, public realm improvements, active travel improvements on Newport Road West and Church Road and improvements to the Caldicot Leisure Centre and Skate Park. The table below outlines each intervention and the benefits that they would generate.

Intervention	Benefit	Monetised/Non-Monetised
Regeneration of Nos 7-43 Newport Road	Land Value Uplift	Monetised
	Wider Land Value uplift	Monetised
	Supporting increased footfall in the town centre	Non-monetised
	Providing better accessibility to the town centre	Non-monetised
Active Travel Improvements	Journey quality benefits (AMAT)	Monetised
	Wider benefits from active travel	Monetised
	Public Realm Willingness to Pay	Monetised

	Mode shift from cars to active travel	Monetised
Caldicot Leisure Centre and Skate Park	Revenue attained from additional demand	Monetised
	Health Benefits because of increased access to physical activity	Monetised
	Wider benefits associated to access to physical activity.	Non- monetised

Benefits related to public realm improvements have been estimated using an economic model and have been based on MHCLG figures. Wider benefits associated with the public realm improvements and transport improvements have also been estimated using the economic model and have been based on figures outlined in appropriate studies.

All benefits relating to active travel improvements have been estimated using the TAG Active Mode Appraisal Toolkit (AMAT) as well as the DfT Small Scheme Appraisal Toolkit.

For more details regarding the estimation of benefits please see Appendix 6-9.

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

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

Tab B – Discounted benefits by category (£m)

5.5 Value for money of proposal

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

The central benefit-cost ratio (BCR) which demonstrates the value for money of the scheme should be based on the valuation of transport-related benefits (in

accordance with WebTAG guidance) and other wider benefits including land value uplift in line with interventions coming forward as part of the proposed scheme.

Key points on the approach are as follows:

- Scheme specific costs and values have therefore been captured in the appraisals.
- Values have been discounted at 3.5%

The present value of costs (including optimism bias and public sector funding) is estimated to be £21,008,785, this includes costs for improvements at Newport Road, active travel improvements, public realm improvements and improvements at Caldicot Leisure Centre as well as public sector costs. All costs and benefits are present in 2021/22 prices. Active Travel benefits have been calculated and these have been uplifted to 2021/22 figures so that the appraisal is line with all other benefits. Present value benefits resulting from active travel interventions on Newport Road West and Church Road add up to £1,479,417. The estimated gross present value (in 2021/22 prices) of benefits from wider public realm improvements is £720,273.

The estimated gross present value benefit (in 2021/22 prices) from regeneration at Newport Road includes land value uplift benefits of £15,248,912, including revenue attained by the public sector from the sale of units as outlined in the viability assessment from TC Consult. Wider land value benefits due to regeneration are £3,038,896. Improvements to the Caldicot Leisure centre comprise £8,887,229 of estimated gross present value benefit (2021/22 prices.) which includes revenue attained from additional users.

Benefit-Cost Ratios

Taking into account the above the BCR is estimated to be 1.4.

Total net additional benefits	Preferred Option (NPV, 2021-22 prices) (£ms)
Benefits for the BCR	
Active Travel benefits (Church Road)	£0.52
Active Travel benefits (Newport Road West)	£0.95
Newport Road Land Value Uplift	£15.25
Public Realm WTP	£0.72
Leisure Centre Health Benefit	£8.89
Wider LVU Benefits	£3.03
Total benefits for the BCR (A)	£29.37
Costs	
LUF cost/funding (B)	£15.62
Co-funding local authority cost (including borrowing) (C)	£5.39
Total cost (LFU + Co-funding) (D)	£21.00
Private sector cost (E)	£0

BCR (A-E) / D	1.4										
Overall the LUF interventions present an acceptable value for money.											
5.5c Please provide a summary assessment of risks and uncertainties that could affect the overall Value for Money of the bid. (Limit 250 words)											
<p>There are a number of limitations associated with the active travel appraisal which may create some uncertainty. As noted above, this includes potential disbenefits associated with re-routing of traffic, although these are not expected to be significant. The active travel benefits for Newport Road West are based on a high level assumption about the base number of trips and the increase that could result from the improvements. These benefits therefore have uncertainty around them, although a conservative approach has been applied and hence the benefits could be larger than the value that has been included.</p> <p>Assumptions have also been made for some of the land value uplift calculations and other wider economic benefits, based on studies or benchmarks.</p> <p>Sensitivity analysis</p> <p>Sensitivity analysis tests the impact on the BCR from changing a number of key assumptions and variables. The sensitivity tests undertaken include:</p> <ul style="list-style-type: none"> • Higher costs – 20% higher than the preferred option • Lower Benefits – 20% lower than the preferred option • Higher Benefits- 20% higher than the preferred option 											
	<table border="1"> <tr> <th></th> <th>Preferred Option</th> <th>Higher Costs (+20%)</th> <th>Lower Benefits (-20%)</th> <th>Higher Benefits (+20%)</th> </tr> <tr> <td>Preferred Option</td> <td>1.40</td> <td>1.17</td> <td>1.12</td> <td>1.67</td> </tr> </table>		Preferred Option	Higher Costs (+20%)	Lower Benefits (-20%)	Higher Benefits (+20%)	Preferred Option	1.40	1.17	1.12	1.67
	Preferred Option	Higher Costs (+20%)	Lower Benefits (-20%)	Higher Benefits (+20%)							
Preferred Option	1.40	1.17	1.12	1.67							
5.5d For transport bids, we would expect the Appraisal Summary Table , to be completed to enable a full range of transport impacts to be considered. Other material supporting the assessment of the scheme described in this section should be appended to your bid.											

PART 6 DELIVERABILITY

6.1 Financial

See technical note Table 1 for further guidance.

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

The table below outlines the financial ask from LUF of £14,777, 569 with other contributions shown totalling £6,100,000. The local and third party contributions are therefore 30% of the overall project costs.

Welsh Government Transforming Towns (grant - property)	£2,200,000
Welsh Government Transforming Towns (grant public realm)	£600,000
Welsh Government AT	£850,000
S106	£150,000
MCC Capital	£2,300,000
Others	£0
Total	£6,100,000
Total Project Costs	£20,877,569
LUF Project Ask	£14,777,569

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

See attached.

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

☒ Yes

☐ No

<p>The following contributions are being sought at the time of writing this LUF submission.</p> <p>Nos 7-43 Newport Rd An application to Welsh Government's Transforming Towns programme has been made for a grant towards the acquisition of the retail block. An indicative allocation has been made of £2.3m which can include acquisition and/or refurbishment/remediation works. We anticipate a decision on this funding application over the coming months.</p> <p>Connections Project In 2020-21, a revised bid for Church Road phase 2 has been resubmitted to Welsh Government under their Active Travel fund. This is for £500,000 with a decision due in the coming months.</p> <p>For 2021-24, the Council will submit for £600,000 of Welsh Government Active Travel funding for Newport Rd (west) and £100,000 towards the town centre public realm project as part of the Connections Project.</p> <p>£150,000 of S106 will be directed towards the Connections project during 2021-24.</p> <p>Leisure & Well-Being Hub No external funding has been sought to date, with the County Council providing a capital contribution of £1m.</p>	
<p>6.1d Please explain what if any funding gaps there are, or what further work needs to be done to secure third party funding contributions. (Limit 250 words)</p>	
<p>None. Please see those funding applications that are pending.</p>	
<p>6.1e Please list any other funding applications you have made for this scheme or variants thereof and the outcome of these applications, including any reasons for rejection. (Limit 250 words)</p>	
<p>In January 2021, an application to Welsh Government's Active Travel scheme was made for implementation of phase 2 of Church Rd works. The grant sought was for £1.4m out a total £1.7m total project cost. In late March 2021 the application was not successful due to value for money reasons. Since this decision, the County Council has reviewed its detailed design and costings with a value engineering exercise undertaken. The revised total cost is now £1.2m.</p>	
<p>6.1f Please provide information on margins and contingencies that have been allowed for and the rationale behind them. (Limit 250 words)</p>	
<p>Commentary on the three projects are as follows:</p>	

Repurposing the Retail Block

Rates for Building works reflect standard quality construction with higher specification finishes & fittings. Risk Allowances for i) Design Development ii) Construction Risks iii) Employer Change Risks and iv) Other Risks have been accounted for which have a range of 2% to 5%.

Connections Project

All of the component parts of this project are well advanced on terms of cost assessment and accuracy due to rates obtained from a similar project in Q4 of 2020. Even so, optimism bias has been set at 20% for these projects due to the associated risks with works within a highway.

Leisure and Well-being Hub

To achieve cost certainty, 19 different surveys were undertaken in order to identify any issues that may impact on the design and costs of construction works. This has reduced some of the risk, but a level of contingency still sits within the project, split between contractor risk (so 3% of construction costs – or 175k) with a budget for client risk being built in at 4% (or 313k) on the whole project costs.

The costings for the redevelopment of the leisure centre were provided in 2019 prices, these costings have been converted to 2021 prices using the GDP Deflator. This adjustment has been made to the total base cost.

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

The County Council has undertaken an appraisal of costs for all three projects that are either new or updated. These have been undertaken by independent and qualified cost consultants (Capita, Rhomco and TC Consult). These order of cost estimates have been obtained for the three projects with 2021 construction rates, inflation and other costs included.

As outlined later in the delivery plan there will be robust project management procedures that will manage project delivery, budget setting, change control and variance reporting. Whilst the costs are accurate and physical preliminary surveys have directed us to the right level of risk costs, projects can be exposed to unknown costs which need to be carefully managed. These may include:

- Availability of contractors and a lack of competitive tenders due to capacity of submitting;
- Location of unknown services and their diversion or accommodation;
- Rise in costs in specific materials due to global or local supply chain issues;
- A further global outbreak of Covid-19;

The mechanisms to control the main financial risks are:

- Use of an approved tender framework that the County Council is signed upto;
- Thorough assessment of tenders returned for the respective works packages to understand assumptions made by contractors and where the client is exposed to unknown risk and the means to mitigate;
- Use of a project initiation document that sets out the protocols for communication and reporting;
- Clear lines of management and decision-making;
- Strict change control mechanisms and register;
- Regular accounting reports on actual spend against projected and anticipated outturn cost;
- Continuous dialogue with the respective funders.

Our risk register is found in the appendices which identifies some of the main financial risks.

6.2 Commercial

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

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

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

As public procurers the County Council is in a unique position to move beyond just 'saving money' – to addressing social, economic and environmental issues. Optimal public procurement can improve lives and make Monmouthshire a more sustainable and resilient place. The Wales Procurement Policy Statement supports the use of procurement in being a strategic tool to deliver economic benefit.

Monmouthshire County Council's Key Financial Thresholds & Procurement Procedures are found within our appendices. For LUF, the Council will be utilising existing frameworks, utilising those that offer the best value for money. Where officers wish to rely upon the use of a framework arrangement, they must ensure that all relevant guidance issued in relation to the use of the framework is understood and abided by. This will include, the scope of the framework, the process for utilising the framework, whether this be a mini competition or direct award, the weightings attached to the award criteria and the terms and conditions that govern its use. All mini competitions made via a framework agreement must include a contract award notice via Sell2Wales when the contract has been awarded.

The procurement strategies for the respective projects are outlined below.

Nos 7- 43 Newport Road

A refurbishment specification will be prepared by the County Council's internal design team and tenders would be invited via the Sell2Wales portal to maximise the opportunity for SME and local contractors to bid for this work. Bids will be evaluated against price, quality and decarbonisation criteria.

Connections Project

For the transportation based projects we will use the SEWH - the South East & Mid Wales Collaborative Civil Engineering and Highways Construction Framework. The Framework covers maintenance works, project works, and surfacing and surfacing preservation for highways and civil engineering schemes. The specification of the Framework is the 'Specification for Highway Works' published by The Stationary Office (formerly HMSO). The main form of contract that would be used would be the Institution of Civil Engineers' NEC 4 Engineering and Construction Contract, June 2017, Option A.

Leisure & Well-being Hub

Denbighshire County Council (the Council) on behalf of Welsh local authorities placed a contract notice 2016/5 137-246892 on 19th July 2016 in the Official Journal of the European Union seeking expressions of interest from potential service providers for the provision of services to itself and the other contracting bodies identified in the contract notice (Clients) under a framework agreement (the UK Leisure Framework). On the basis of the Contractor's Tender (Alliance Leisure), the Council selected and entered into (on 2nd February 2017) a framework agreement with the Contractor (the Framework Agreement) to provide services to those Clients who place Projects for works and/or services in accordance with the UK Leisure Framework. This framework was extended on 20/10/20 until January 2022.

Monmouthshire County Council has used this framework to appoint Alliance Leisure with feasibility work, business planning, design development and costings. It intends to retain their services to deliver Leisure related Facilities design and Construction of Leisure related Facilities at Caldicot Leisure Centre.

6.3 Management

See technical note Section 4 and Table 1 for further guidance

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

- Clear milestones, key dependencies and interfaces, resource requirements, task durations and contingency.
- An understanding of the roles and responsibilities, skills, capability, or capacity needed.
- Arrangements for managing any delivery partners and the plan for benefits realisation.
- Engagement of developers/ occupiers (where needed)
- The strategy for managing stakeholders and considering their interests and influences.

- Confirmation of any powers or consents needed, and statutory approvals eg Planning permission and details of information of ownership or agreements of land/ assets needed to deliver the bid with evidence
- Please also list any powers / consents etc needed/ obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them.

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

The Delivery Plan is appended to this bid which provides a more in depth detail on the delivery programme, organisational set up, engagement strategy and identified consents the respective projects require.

There are three projects which are subject to a logic of phasing between those that are stand-alone, well-advanced and “shovel ready” and those that need to be implemented earlier on in terms of the sequence of works. **The summary project plan** overleaf provides a summary of the main headline activities with a more detailed Gantt chart within the appendices. To meet Gateway 1 of this submission, a number of our projects can incur capital expenditure in 2021-22.

Connections Project

This single project is broken down into three areas, with:

- Church Rd element having the necessary consents, detailed design development and contract documents ready; it is ready to commence procurement in July 2021 but can be mobilised in September 2021 subject to award of funding; the only dependency here is securing of match funding from Welsh Government’s Active Travel funds. This project has a six month construction programme, potentially incurring 60% of its spend in 2021-22 financial period.

Leisure & Well-being Centre

This project is designed and costed to RIBA level 4. It needs to secure planning consent which is shown to be achieved by early January 2022 with three months to mobilise the contract, site and preparatory works.

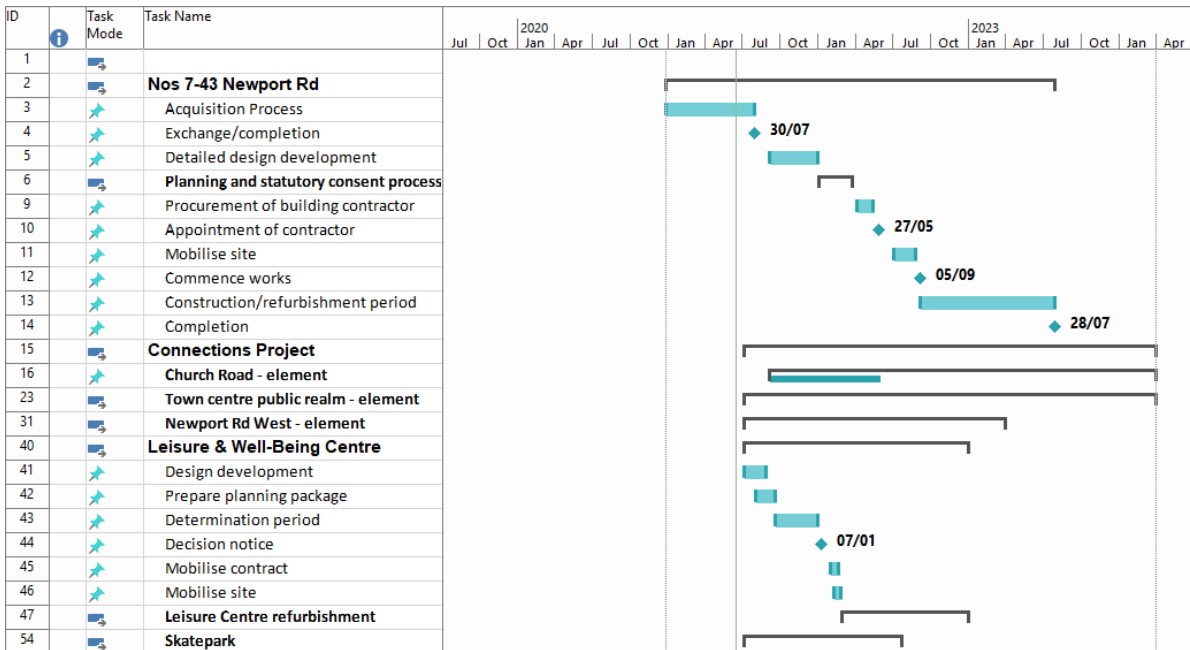
Beyond the 2021-22 period, the projects track the following critical paths, milestones and key dependencies

Nos 7-43 Newport Road

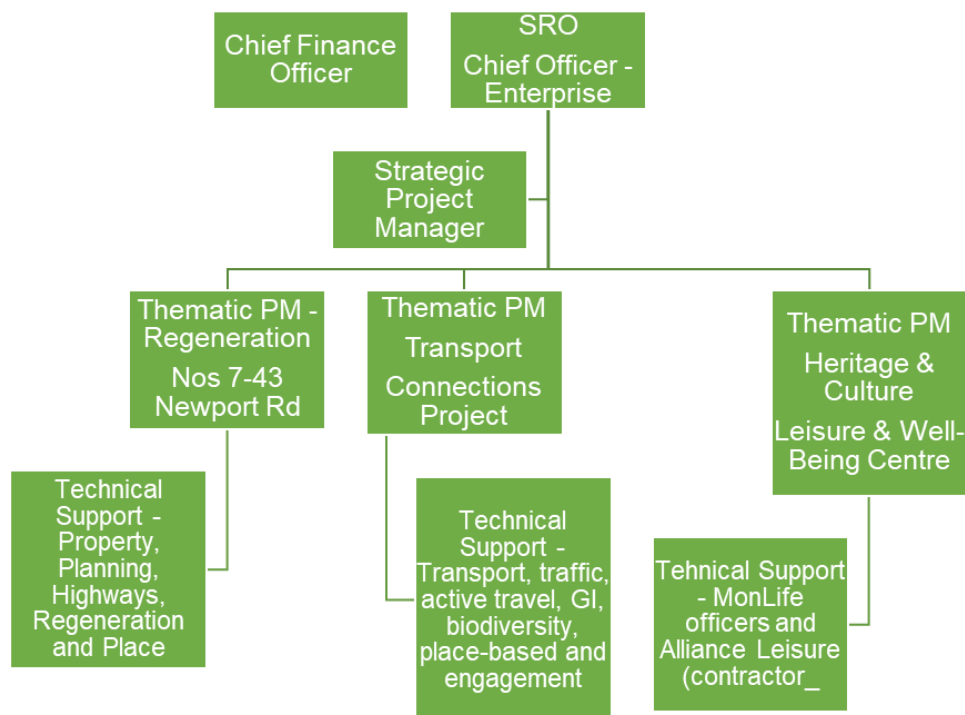
This project is presently closing off the acquisition of the freehold and leaseholder through a Welsh Government Transforming Towns grant. Subject to this approval and internal financial checks, the site would require condition surveys, detailed measured surveys leading to detailed design development that will contribute to a full planning application and also contract documents for the procurement stage. We envisage full planning for the works to be secured in late March 2022 with the 2022-23 period identified for the physical refurbishment of the block.

Connections Project

The other two projects are at a good level of design certainty and cost accuracy with only pre-SAB and potentially full SAB approval required. Newport Road west can be delivered within 2022-23 with the town centre public realm to follow the physical building works to nos 7-43 Newport Road in 2023-24.



The **organisational structure** for project delivery which is shown below.



Stakeholder Management has already been established within Caldicot with a multi-sector town centre stakeholder forum with the County Council supporting the communications message on site and through digital information and messaging.

The delivery plan also outlines the status on **statutory consents** in more detail with the two property related projects – Nos 7- 43 Newport Rd and the Leisure and Well-being Hub requiring planning consent with the programme showing this to be secured during Q3 and Q4 of 2021-22. The Connections projects are all within the highway and only require screening for SAB (SUDs) requirements.

6.3b Has a delivery plan been appended to your bid?

See attached.

☒ Yes
☐ No

6.3c Can you demonstrate ability to begin delivery on the ground in 2021-22?

See delivery plan, specifically programme of works.

☒ Yes
☐ No

6.3e Risk Management: Places are asked to set out a detailed risk assessment which sets out (word limit 500 words not including the risk register):

- the barriers and level of risk to the delivery of your bid
- appropriate and effective arrangements for managing and mitigating these risk
- a clear understanding on roles / responsibilities for risk

The Caldicot Place (LUF) project risk register lists all identified risks, their causes and consequences, assessment of likelihood and impact, and proposed management actions to mitigate the risk. The register is the focal point for addressing risks, actions and impacts and is the key management tool for communication and tracking actions.

Key Barriers and Level of Risk

See below examples of key barriers we have identified:

Figure 4 - High Level Barriers and Risk (RAG coded)

Project	Barrier	Level of Risk
Nos 7-43 Newport Road	Sequence of work between building contract and public realm works within Connections Project being mismatched	

	Managing the town centre during works to minimise business disruption	
	Managing existing tenants during the works and their needs	
	Ensuring a robust occupier and letting strategy for refurbished space	
Connections Project	Management of highway network and phasing of works so that disruption is minimised	
	Unknown utilities and constraints on site that have not been identified through survey work	
	Continued supply chain disruption due to Covid-19	
Leisure & Well Being Centre	Managing customers during works that ensures their retention and satisfaction levels	
	Managing relationships with school and onsite tenants	
	Unknown utilities and constraints on site that have not been identified through survey work	

Management/Mitigation

The risks on the current register have been identified at the early concept stage of the project. New risks will be added from the issues log, highlight reports and specific workshops. The risks will need to be quantified and considered when presenting budget costs, this will assist the Client Team in managing tolerances etc. The owner of individual risks should also be noted on the risk register; however, risks will generally be owned by the Client Team, their management will often be delegated to Project Team members. The RAG system helps focus the need for mitigation action.

The key controls are:

- procedures are in place to identify, assess, prevent or contain material known risks, and these procedures are operating effectively throughout the Authority;
- a monitoring process is in place to review regularly the effectiveness of risk reduction strategies and the operation of these controls;
- managers know that they are responsible for managing relevant risks and are provided with relevant information on risk management initiatives;
- managers apply a standard approach to risk identification and recording, using the risk management strategy;
- provision is made for losses that might result from the risks that remain;
- procedures are in place to investigate claims within required timescales;
- acceptable levels of risk are determined and insured against where appropriate;
- the Authority has identified business continuity plans for implementation in the event of disaster that results in significant loss or damage to its resources.

Roles and Responsibilities

The Strategic Project Manager will be the main risk manager that co-ordinates, monitors, records and is part of the decision-making process in the event of any

project variances. This post will report to the SRO and lead accountant and Senior Finance Officer in relation to financial implications and recommendations.

6.3f Has a risk register been appended to your bid?



Yes



No

6.3g Please evidence your track record and past experience of delivering schemes of a similar scale and type (Limit 250 words)

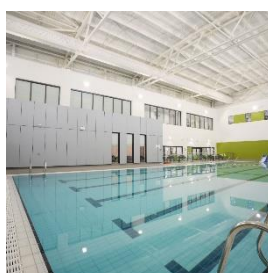
The County Council has a sound track record in delivering projects within the regeneration, transportation and heritage and culture setting.

The Council uses a mix of in-house technical officers and when needed augments these with external consultancies. In-house skills include:

- Regeneration and place-making
- Property and asset management/delivery
- Transport and traffic
- Active travel
- Green infrastructure and biodiversity

In recent years, notable projects include:

- Chepstow High Street regeneration scheme - £1.5 million, April 2005
- Provision of new leisure centre at Monmouth – cost of £7.3 million, phased opening fitness offer only August 2018 & fully open February 2019
- Civilised street scheme, Cross Destination space, Caldicot - £1.5 million, completed March 2021
- Refurbishment of Abergavenny Town Hall into a multi-purpose facility (library, TIC, community space, one stop shop, etc) - £1.8 million, completed March 2021



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

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

The Chief Financial Officer is a key member of the overall Project Board. The Board will receive reports to confirm project delivery and costs to ensure the individual projects remain on target and within the project plan. Project Board will meet bi-monthly and will receive a financial report, key milestone report and a review of the risk register to support any variation to expenditure, timescales or project delivery.

The Project Board will consist of Senior Leadership Team Officers. The Strategic Project Lead Officer will report directly to the Board and will ensure that all programme changes and variations are reported there. The Board is responsible for ensuring that changes to the programme are managed effectively and will monitor any remedial actions implemented to ensure that the project remains on track. Should significant concerns be raised that may impact the ability to deliver any aspect of the project, then the Project Board will commission an independent gateway review which will be undertaken to provide an objective and independent view and to assess the continued viability of the scheme.

6.4 Monitoring and Evaluation

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

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

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

Objectives

The evaluation of Caldicot's Place (LUF) Project will have the following objectives:

1. To assess how the package of projects are being developed and delivered against agreed LUF aims and objectives;
2. To assess the project governance and management during the project and also its future sustainability, post 2024;
3. To assess the impact of implementation of the package of projects and the resultant aggregated outcomes and impacts.

The scope of the evaluation is for the period October 2021 to March 2024. The geographical coverage is Caldicot town centre and its immediate environs of the Leisure Centre and the east-west road corridor from Church Rd to Newport Rd west. The evaluation will also look at secondary and multiplier benefits across the wider place and community.

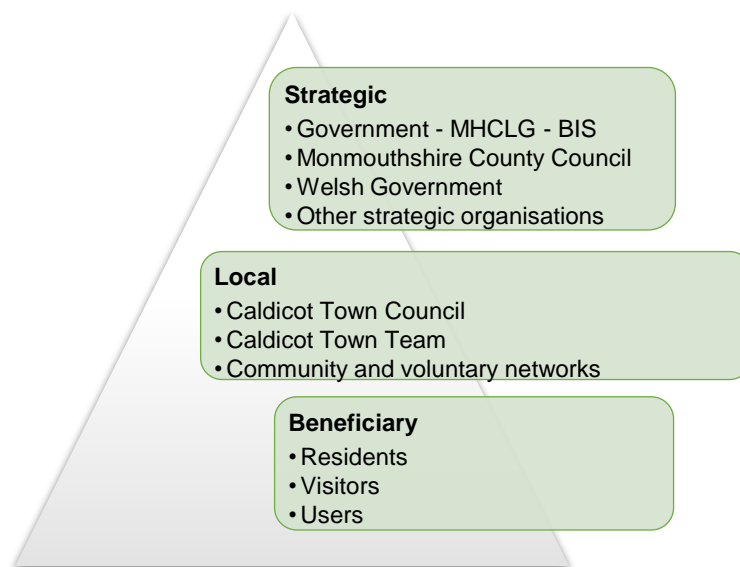
Evaluation Approach

Our approach to this evaluation is formative and summative assessing the process and impact of LUF on several suggested Fund objectives:

1. Transport scheme to reduce carbon emissions, improve air quality, cut congestion, support economic growth and improve the experience of transport users.
2. Regeneration and town centre investment to upgrade eyesore buildings and dated infrastructure, acquire and regenerate brownfield sites, invest in secure community infrastructure and crime reduction so that public services and safe community spaces are brought back into town and city centres.
3. Cultural investment to maintaining, regenerate, or create repurposed museums, galleries, visitor attractions (and associated green spaces) and heritage assets as well as creating new community-owned spaces to support the arts and serve as cultural spaces.
4. For investment proposals to support high priority projects that will make a visible impact in local areas.
5. For capital and infrastructure projects to have a visible impact on our surroundings, being aligned to and support Net Zero goals, either based on low or zero carbon best practice, adopt and support innovative clean tech and/or support the growth of green skills and sustainable supply chains.

Audience for Evaluation

Figure 5 - Hierarchy of Stakeholders



The evaluation will be open to a multi-layered audience as shown above with case studies, lessons learnt and knowledge transfer and continual free flow of information during the process.

Tasks

The key tasks for the evaluation include:

- To sense check the baseline data that has been brought together, that is both qualitative and quantitative that sets a benchmark for the evaluation process, identifies any barriers/opportunities at the start and validates the project aim and objectives;
- To review the Caldicot Place (LUF) project process from a strategic to operational level and how progress is being made against project objectives;
- To understand the process, logic and outputs from that lead to “*improved lives by giving people pride in their local communities; bringing more places across the UK closer to opportunity; and demonstrating that government can visibly deliver against the diverse needs of all places and all geographies*”.
- To understand the impact of the key projects and deliverables.

Data & Monitoring

The programme manager will have responsibility for requesting, collecting, analysing and reporting data to the town centre project board. A centralised system will be used to record and evidence activity. Storage will be secured and will abide by the Data Protection Act 2018.

Monitoring Systems

The project will create a library of baseline project documentation, management and monitoring information. This will provide a technical context for any future evaluation of the project and its constituent parts. Documents and information will include (but are not limited to) the following:

- Key strategic documents that support the project;
- Approved project application and funding letters with conditions;
- Monitoring and reporting documents; financial and physical (MIS);
- Project management manuals – systems and protocols;
- Organisation and management systems;
- Meeting notes and reports;
- Marketing and promotion activities and associated material;
- Desktop analysis of project documentation – strategic and delivery information e.g. monitoring returns on expenditure, milestones, outputs.

The management information system will provide a spreadsheet-based file that tags project activity to key results, outputs and outcomes by theme or at a strategic level. These systems also have links to evidence and documents that supports progress to date. It provides an actual position on indicators against targets and shows variances. It is also linked to financial expenditure, claim made, and grant income received.

Overview of key metrics for M&E

An overview of some of the key metrics is outlined below, specifically for outputs and outcomes.

Indicators	Outputs	Outcomes
------------	---------	----------

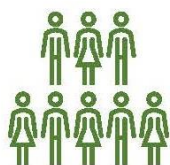
Transport	Modal split Traffic volume No2 emissions PT patronage User satisfaction Health and well-being	New or upgraded cycle/walking paths No of active people	Reduced emissions Improved health and well-being Reduced traffic flows Drop in accident rate
Regeneration	Vacancy rates Diversity of uses Footfall Dwell Business confidence Perception	Delivery of public spaces Remediation of existing town centre stock Community hub created	Enhanced experience Retention and attraction of activity Local economy thriving An accessible place
Culture & Heritage	Number of visitors Learning activities Perceptions of place Direct spend Dwell	New or upgraded community hubs, spaces and assets New or upgraded community centres, museums, libraries, historical buildings No of active people	Improved arts, community, cultural and heritage offer

The following visual outlines our strategic outputs and outcomes we plan to achieve through this LUF investment and in aligning other funds and investment.

Figure 6 - High Level Outputs & Outcomes

Levelling Up Caldicot

- ✓ 3 projects
- ✓ 4 years
- ✓ Connectivity & Wellbeing
- ✓ £27 million total investment
- ✓ £16 million Levelling Up Fund



- ✓ 13,000 direct beneficiaries
- ✓ West End lower super output area ranked 160/1909 in Welsh Index of Multiple Deprivation for its Physical Environment.
- ✓ Caldicot Castle 1 area ranked 303/1909 in Welsh Index of Multiple Deprivation for its Access to Services



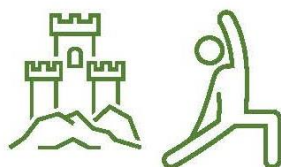
- ✓ 6 km of new or improved Active Travel Routes



- ✓ Investment in Severn Tunnel Junction Transport Hub



- ✓ Repurpose 1960s retail block
- ✓ Provide affordable in-town living
- ✓ Create social public space
- ✓ Integrated community hub



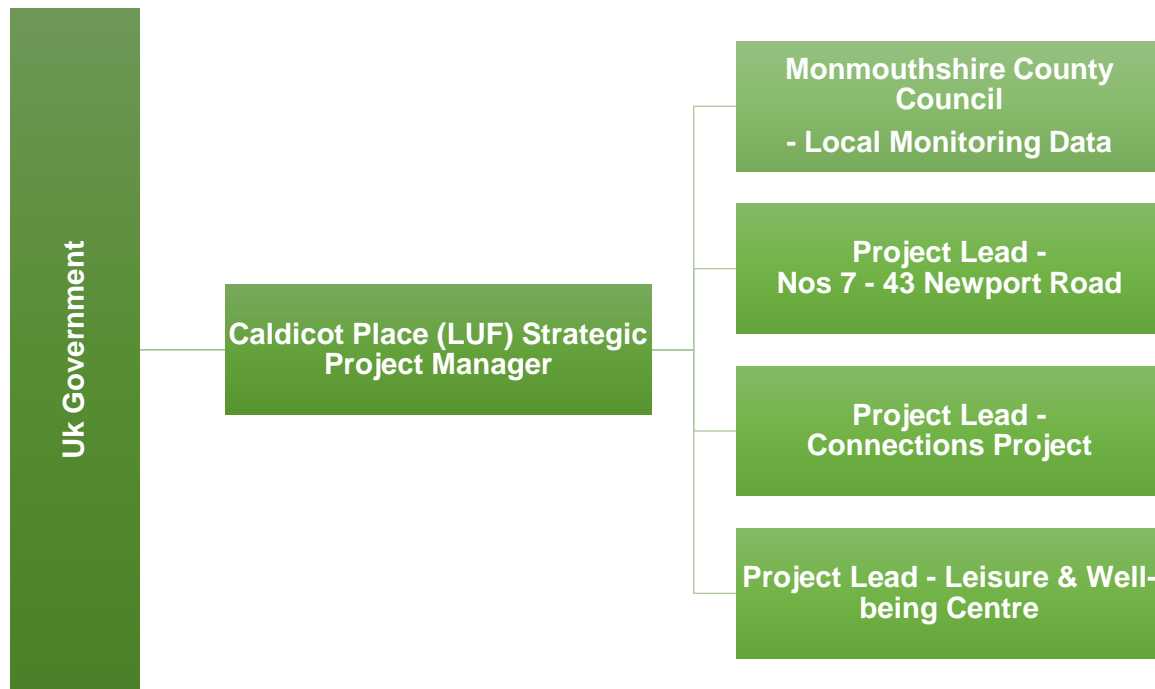
- ✓ Investment in town's leisure centre
- ✓ Improvements to Young People's Provision
- ✓ Enhanced cultural space in town's Castle



- ✓ Multi partner working
- ✓ Building sustainability

Identify the Resources Required and Governance Arrangements

The Strategic Project Manager will have ultimate responsibility and sign off of monitoring and regular claims for Monmouthshire County Council and onwards to UK Government. This will include physical monitoring evidence that will be linked to financial expenditure.



Key roles and responsibilities include for the Strategic Project Manager are:

- Ensuring appropriate resources
- Ensuring information is collected and available
- Procurement of evaluation consultant
- Appointment
- Day to day management
- Progress and meeting milestones
- Dealing with consultant queries
- Ensuring feedback
- Dissemination of evaluation findings

PART 7 DECLARATIONS

7.1 Senior Responsible Owner Declaration

As Senior Responsible Owner for Caldicot Place Scheme I hereby submit this request for approval to UKG on behalf of Monmouthshire County Council and confirm that I have the necessary authority to do so.

I confirm that Monmouthshire County Council will have all the necessary statutory powers and other relevant consents in place to ensure the planned timescales in the application can be realised.

Name: Frances O'Brien

Signed:



7.2 Chief Finance Officer Declaration

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

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

Name: Peter Davies

Signed:



7.3 Data Protection

Please note that the The Ministry of Housing, Communities and Local Government (MHCLG) is a data controller for all Levelling Up Fund related personal data collected with the relevant forms submitted to MHCLG, and the control and processing of Personal Data.

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

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

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

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

Project 1	
A1. Project Name	
Repurposing Retail Block	
A2. Strategic Linkage to bid: Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
<p>Nos 7-43 Newport Road is located at the heart of Caldicot town centre with its proposed acquisition, refurbishment and repurposing presenting a renewed focus for the town, meeting the Vision that is <i>"Caldicot - A Connected Community for Residents and Visitors with Wellbeing at its heart"</i> A place for living, well-being, trade, enterprise and learning and is connected into its neighbourhoods and the Living Levels. This will lead to greater coherent identity and increased economic well-being for the town with it sitting on the Connections Project Axis.</p>	
A3. Geographical area: Please provide a short description of the area covered by the bid (<u>in no more than 100 words</u>)	
<p>Caldicot is located within the southeast corner of Monmouthshire known as Severnside, situated between Chepstow and Newport on the Gwent levels.</p> <p>It is framed by the M48 to the northern edge and the M4 to the south with access to Cardiff to London Paddington trains at Severn Tunnel Junction. It has a population of c12,000 with a large comprehensive school, some local employment (manufacturing, service and distribution) and has a medieval castle and country park.</p>	
A4. OS Grid Reference	ST 48001 88329
A5. Postcode	NP26 4BG
A6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	Monmouthshire County Council
A7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
A8. Project theme Please select the project theme	<input type="checkbox"/> Transport investment <input checked="" type="checkbox"/> Regeneration and town centre investment

	<input type="checkbox"/> Cultural investment						
A9. Value of capital grant being requested for this project (£):	£3,860,500						
A10. Value of match funding and sources (£):	£2,200,000						
<p>A11. Value for Money</p> <p>This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment (Limit 250 word)</p> <p>The main benefits and impacts of this project are to address the physical condition and depressed commercial activity within a retail block that can meet local community needs within Caldicot town centre.</p> <p>Such an investment will have a direct impact specifically an indication to the town and future investors of intent and strategic direction of the town centre that will enhance the physical appearance and identity, a letting and occupier strategy that is responsive and agile to the changing needs of a High Street such as Caldicot. The investment will also enhance the quality of in-town living and help consolidate the place as a neighbourhood.</p> <p>The investment will stimulate higher pedestrian footfall, longer dwell and linked activity resulting in a renewed experience having a direct relationship to those activities within the Connections project. Secondary and multiplier benefits will include diversion of leaked expenditure, the recycling of local spend and a more coherent and cohesive Caldicot identity.</p> <p>Monetised impacts include i) Land Value Uplift and ii) Wider Land Value uplift.</p> <table border="1"> <thead> <tr> <th>Scheme Impact</th><th>Benefits (2021 prices, discounted)</th></tr> </thead> <tbody> <tr> <td> Land Value Uplift <ul style="list-style-type: none"> Land Value Uplift Benefits generated from the redevelopment of No7-43 Newport Road. Calculations have been based on a viability estimates undertaken by TC Consult. </td><td>£15,248,912</td></tr> <tr> <td> Wider Land Value Uplift <ul style="list-style-type: none"> Wider LVU benefits as a result of interventions in Caldicot town centre. . </td><td>£3,038,896</td></tr> </tbody> </table>		Scheme Impact	Benefits (2021 prices, discounted)	Land Value Uplift <ul style="list-style-type: none"> Land Value Uplift Benefits generated from the redevelopment of No7-43 Newport Road. Calculations have been based on a viability estimates undertaken by TC Consult. 	£15,248,912	Wider Land Value Uplift <ul style="list-style-type: none"> Wider LVU benefits as a result of interventions in Caldicot town centre. . 	£3,038,896
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Wider Land Value Uplift <ul style="list-style-type: none"> Wider LVU benefits as a result of interventions in Caldicot town centre. . 	£3,038,896						

A12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.

Present Value Benefits	£18,287,808
Present Value Costs	£6,503,361
BCR	2.81

The No7-43 Newport Road scheme is therefore considered to have a high value for money.

A13. Where available, please provide the BCR for this project

2.81

A14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.

These include:

Supporting increased footfall in the town centre

Providing better accessibility to the town centre.

Greater town and community well-being – socio, economic, cultural and environmental

A15. **Deliverability**

Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.

Planning permission is required for the external and internal refurbishment works to this town centre retail block which is shown to be secured by March 2022.

A16. **The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22**

As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22

A17. Does this project includes plans for some LUF expenditure in 2021-22?

☐ Yes

☒ No

A18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?

☐ Yes

☒ No

A19. Please provide evidence	The property is linked and co-dependent on the town centre public realm element of the Connections Project. This project will enhance the frontage of this core retail block, assisting active frontages, improved accessibility and active travel infrastructure.
A20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
A21. Please provide evidence	Not applicable
Statutory Powers and Consents	
A22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.	
A23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.	Full planning permission Pre SAB (SUDs) application Programme shows these to be obtained by March 2022

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

Project 2	
B1. Project Name	Connections Project
B2. Strategic Linkage to bid:	
Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
<p>This project proposal would provide an active travel corridor from the east of the town, through the town centre and onwards to Newport Rd (West) with future linkages to the mainline rail station at Severn Tunnel Junction. This will include low traffic neighbourhoods, accessible public realm and integration with public transport hubs.</p> <p>There is a local need to improve accessibility and mobility across the town to narrow the gap between those economically active and those that face barriers to work, health, community, and other activities.</p>	
B3. Geographical area:	
Please provide a short description of the area covered by the bid (<u>in no more than 100 words</u>)	
<p>Caldicot is located within the southeast corner of Monmouthshire known as Severnside, situated between Chepstow and Newport on the Gwent levels.</p> <p>It is framed by the M48 to the northern edge and the M4 to the south with access to Cardiff to London Paddington trains at Severn Tunnel Junction. It has a population of c12,000 with a large comprehensive school, some local employment (manufacturing, service and distribution) and has a medieval castle and country park.</p>	
B4. OS Grid Reference	ST 48001 88329
B5. Postcode	NP26 4BG
B6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	Monmouthshire County Council
B7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	
B8. Project theme Please select the project theme	<input checked="" type="checkbox"/> Transport investment

	<input type="checkbox"/> Regeneration and town centre investment <input type="checkbox"/> Cultural investment						
B9. Value of capital grant being requested for this project (£):	£4,300,000						
B10. Value of match funding and sources (£):	£1,900,000						
B11. Value for Money <p>This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment</p> <p>The main benefits and impacts of this project is create an integrated axis of active travel and local transport interventions that re-enforces the Vision for Caldicot that is centred on it being a place for living, well-being, trade, enterprise and learning and is connected into its neighbourhoods and the Living Levels.</p> <p>Against the backdrop of housing growth within the town and its proximity to the Severn Bridges and West of England there is a need to provide quality and active walking and cycling routes that are linked into public transport hubs. Benefits include the reduction of carbon emissions, improving air quality, cutting congestion, supporting economic growth and improving the experience of transport users. This investment will also help improve mobility for those residents who have been economically inactive and increase opportunities for learning, employment and other activities within the town and region.</p> <p>Monetised impacts include i) Journey quality benefits (AMAT) ii) Wider benefits from active travel iii) Public Realm Willingness to Pay and iv) Mode shift from cars to active travel.</p> <table border="1"> <thead> <tr> <th>Scheme Impact</th> <th>Benefits (2021 prices, discounted)</th> </tr> </thead> <tbody> <tr> <td> Active Travel Benefits <ul style="list-style-type: none"> Active travel benefits have been estimated using the TAG Active Modes Appraisal Toolkit. Further benefits relating to benefits to highway users on Church Road have been estimated using the DfT Small Scheme Appraisal Toolkit. </td> <td>£1,479,417</td> </tr> <tr> <td>Public Realm Benefits</td> <td>£720,273</td> </tr> </tbody> </table>		Scheme Impact	Benefits (2021 prices, discounted)	Active Travel Benefits <ul style="list-style-type: none"> Active travel benefits have been estimated using the TAG Active Modes Appraisal Toolkit. Further benefits relating to benefits to highway users on Church Road have been estimated using the DfT Small Scheme Appraisal Toolkit. 	£1,479,417	Public Realm Benefits	£720,273
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Active Travel Benefits <ul style="list-style-type: none"> Active travel benefits have been estimated using the TAG Active Modes Appraisal Toolkit. Further benefits relating to benefits to highway users on Church Road have been estimated using the DfT Small Scheme Appraisal Toolkit. 	£1,479,417						
Public Realm Benefits	£720,273						

<ul style="list-style-type: none"> Willingness to pay benefits (based on DCLG) from improvements to public realm as part of the Connections project 							
<p>B12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.</p> <table border="1"> <tr> <td>Present Value Benefits</td><td>£2,199,689</td></tr> <tr> <td>Present Value Costs</td><td>£6,008,242</td></tr> <tr> <td>BCR</td><td>0.37</td></tr> </table> <p>The Connections scheme is therefore considered to have a poor value for money.</p>		Present Value Benefits	£2,199,689	Present Value Costs	£6,008,242	BCR	0.37
Present Value Benefits	£2,199,689						
Present Value Costs	£6,008,242						
BCR	0.37						
B13. Where available, please provide the BCR for this project	0.37						
B14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.	<p>These include:</p> <p>Increased GI, biodiversity and carbon capture</p> <p>Greater community cohesion, neighbourliness and sense of belonging</p>						
<p>B15. Deliverability Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.</p> <p>The Connections Project does not require planning consent as all of the works are within the highway fall outside of development.</p> <p>There will be a need for a pre SAB application for sustainable urban drainage for the Newport Rd west component of the project, with the other elements (Church Rd and town centre public realm) having been assessed by the SAB or pending a pre SAB application.</p>							
<p>B16. The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22</p> <p>As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22</p>							

<p>The Church Rd element of this project is well advanced and “shovel ready” with detailed design complete and contract documents being prepared with a framework identified for procurement.</p> <p>Dependent on the award of grant, the works can be procured and mobilised within 3 months with a 6 month construction period, with the majority of the works being completed in 2020-21.</p> <p>The other elements – Town Centre Public Realm and Newport Road West would be implemented over the 2022-24 periods.</p>	
<p>B17. Does this project include plans for some LUF expenditure in 2021-22?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B19. Please provide evidence</p>	<p>The works are within the highway and under the control of Monmouthshire County Council and have no co-dependencies of any significance. To delivery.</p>
<p>B20. Can you demonstrate ability to deliver on the ground in 2021-22.</p>	<p><input checked="" type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>B21. Please provide evidence</p>	<p>See B16. Design is advanced and can proceed to procurement for Church Rd element.</p>
<p>Statutory Powers and Consents</p>	
<p>B22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.</p>	
<p>B23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.</p>	<p>Pre SAB application has been made for Newport Road public realm element of the project. This is to be determined with 4 weeks.</p>

	<p>A pre SAB application would need to be made for Newport Road west and if the SAB agrees SUDs is required, a full application would need to be made.</p>
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Annex C – Project Three- description and funding profile (only required for package bid)

Project 3	
C1. Project Name	Leisure and Well-being Hub
C2. Strategic Linkage to bid:	
Please enter a brief explanation of how this project links strategically to the overall bid. (in no more than 100 words)	
<p>One of the projects key objectives is to improve the health and wellbeing and grow participation in regular physical activity from the community and would contribute to the town's vision of <i>"A Connected Community for Residents and Visitors with Wellbeing at its heart" A place for living, well-being, trade, enterprise and learning and is connected into its neighbourhoods and the Living Levels."</i></p> <p>The Leisure and Well-being Hub sits on the edge of Caldicot town centre and has the potential to provide the community with state of the art leisure facilities and an integrated network to support sustainable transport links to and away from the site, with the town at the centre of the overall project.</p>	
C3. Geographical area:	
Please provide a short description of the area covered by the bid (<u>in no more than 100 words</u>)	
<p>Caldicot is located within the southeast corner of Monmouthshire known as Severnside, situated between Chepstow and Newport on the Gwent levels.</p> <p>It is framed by the M48 to the northern edge and the M4 to the south with access to Cardiff to London Paddington trains at Severn Tunnel Junction. It has a population of c12,000 with a large comprehensive school, some local employment (manufacturing, service and distribution) and has a medieval castle and country park.</p>	
C4. OS Grid Reference	ST 48181 87995
C5. Postcode	NP26 4BN
C6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	Monmouthshire County Council
C7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	
C8. Project theme Please select the project theme	<input type="checkbox"/> Transport investment <input type="checkbox"/> Regeneration and town centre investment

	<input checked="" type="checkbox"/> Cultural investment						
C9. Value of capital grant being requested for this project (£):	£7,574,422						
C10. Value of match funding and sources (£):	£1,000,000						
<p>C11. Value for Money</p> <p>This section should set out the full range of impacts – both beneficial and adverse – of the project. Where possible, impacts should be described, quantified and also reported in monetary terms. However, there may be some impacts where only a qualitative assessment is possible due to limitations in the available analysis. There should be a clear and detailed explanation of how all impacts reported have been identified, considered and analysed. When deciding what are the most significant impacts to consider, bidders should consider what impacts and outcomes the project is intended to achieve, taking into account the strategic case, but should also consider if there are other possible significant positive or negative impacts, to the economy, people, or environment</p> <p>Caldicot Leisure Centre has not received substantial investment since the 1970s with the town's recent growth presenting physical challenges to the current building as well as restricting the wider health and well-being of existing and future residents.</p> <p>Its location within 500 metres of the town centre is also an opportunity that needs maximising so that a holistic approach is taken, encouraging linked activity through active travel routes between the commercial and leisure hubs.</p> <p>There are also community benefits specifically for young people with the proposed skatepark meeting a high priority need, providing an environment for cross-generational activity at the leisure centre and outdoors.</p> <p>Monetised impacts include i) Health Benefits because of increased access to physical activity.</p> <table border="1"> <thead> <tr> <th>Scheme Impact</th><th>Benefits (2021 prices, discounted)</th></tr> </thead> <tbody> <tr> <td> Revenue Benefits <ul style="list-style-type: none"> Revenue benefits from additional demand generated. </td><td>£7,669,815</td></tr> <tr> <td> Health Benefits <ul style="list-style-type: none"> Health benefits associated with additional demand generated from an improvement to the leisure centre have been estimated using the Department for Culture Media & Sport (DCMS) study on value of health and educational benefits of sport and culture by Fujiwara et al (2015) </td><td>£1,217,414</td></tr> </tbody> </table>		Scheme Impact	Benefits (2021 prices, discounted)	Revenue Benefits <ul style="list-style-type: none"> Revenue benefits from additional demand generated. 	£7,669,815	Health Benefits <ul style="list-style-type: none"> Health benefits associated with additional demand generated from an improvement to the leisure centre have been estimated using the Department for Culture Media & Sport (DCMS) study on value of health and educational benefits of sport and culture by Fujiwara et al (2015) 	£1,217,414
Scheme Impact	Benefits (2021 prices, discounted)						
Revenue Benefits <ul style="list-style-type: none"> Revenue benefits from additional demand generated. 	£7,669,815						
Health Benefits <ul style="list-style-type: none"> Health benefits associated with additional demand generated from an improvement to the leisure centre have been estimated using the Department for Culture Media & Sport (DCMS) study on value of health and educational benefits of sport and culture by Fujiwara et al (2015) 	£1,217,414						

C12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.

Present Value Benefits	£8,887,229
Present Value Costs	£8,497,183
BCR	1.05

This scheme is considered to have acceptable value for money.

C13. Where available, please provide the BCR for this project

1.05

C14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.

These include:
Wider benefits associated to access to physical activity.

C15. Deliverability

Deliverability is one of the key criteria for this Fund and as such any bid should set out any necessary statutory procedures that are needed before it can be constructed.

This project is designed and costed to RIBA level 4. It needs to secure planning consent which is shown to be achieved by early January 2022 with three months to mobilise the contract, site and preparatory works.

C16. The Bid – demonstrating investment or ability to begin delivery on the ground in 2021-22

As stated in the prospectus UKG seeks for the first round of the funding that priority will be given to bids that can demonstrate investment and ability to deliver on the ground in 2021-22

C17. Does this project includes plans for some LUF expenditure in 2021-22?

☒ Yes

☐ No

C18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?

☒ Yes

☐ No

C19. Please provide evidence

Its is a single site that is not integrated or co-dependent on other activities but would contribute to wider multiplier benefits if linked to the Connections and Repurposing of the Town Centre Retail Block.

C20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input checked="checked" type="checkbox"/> Yes <input type="checkbox"/> No
C21. Please provide evidence	See appendix for further information. Subject to planning consent, site works can be mobilised in January 2022.
Statutory Powers and Consents	
C22. Please list separately each power / consents etc obtained, details of date acquired, challenge period (if applicable) and date of expiry of powers and conditions attached to them. Any key dates should be referenced in your project plan.	
C23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.	Full planning permission Pre SAB (SUDs) application Programme shows these to be obtained by December 2021

ANNEX D - Check List Great Britain Local Authorities

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

Annex E Checklist for Northern Ireland Bidding Entities

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