

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)*: Hinckley and Bosworth Borough Council

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

Bid Manager Name and position: Dr Sharon Redrobe OBE, Chief Executive – Twycross Zoo

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

Contact telephone number 01827 883158

Email address sharon.redrobe@twycrosszoo.org

Postal address: Hinckley Hub, Rugby Road, Leics LE10 0FR

Nominated Local Authority Single Point of Contact: stephen Meynell, Planning Manager (Major Projects) 01455 255775 Stephen.meynell@hinckley-bosworth.gov.uk

Senior Responsible Officer contact details: Matthew Bower, Director
(Environment & Planning) Tel: 01455 255641 matt.bowers@hinckley-bosworth.gov.uk

Chief Finance Officer contact details: Ashley Wilson Head of Finance (S151
Officer) : 01455 255 609 ashley.wilson@hinckley-bosworth.gov.uk

Country:

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

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

[AMION Consulting, Baker Mallett, Just H Architects](#)

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

- Northern Ireland Executive
- Public Sector Body
- District Council
- Third Sector
- Private Sector
- 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

Yes

No

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

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

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

Yes

No

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

PART 2 EQUALITY AND DIVERSITY ANALYSIS

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

Twycross Zoo is an equal opportunities employer and positively encourages applications from suitably qualified and eligible candidates regardless of sex, race, disability, age, sexual orientation, gender reassignment, religion or belief, marital status, or pregnancy and maternity.

The project will follow Twycross Zoo's Equal Opportunities Policy. This policy sets out "*the Company is committed to providing equal opportunities in employment and to avoiding unlawful discrimination in employment and against customers*".

The development and diversification of the species within Twycross Zoo as a result of the NSCC will have a positive impact on school children, with an increase in the educational capacity of the zoo, an increase in the breadth of the education programme and will give Twycross Zoo a greater reach to schools across the region. It will also have a positive impact on school leavers, with greater employment opportunities suited to that group, and an increase in apprenticeships. Furthermore, the construction of new, modern exhibits will enhance the zoo experience for disabled visitors, with facilities being developed fully in line with DDA. Therefore, it is expected the measures proposed have the potential to have positive effects for disabled protected groups, as well as all residents of all ages.

The engagement with prospective partner universities has been crucial to inform the development of the project. A group workshop was held with four Midlands universities as part of this consultation. A key element of the strategy for the project was to raise the opportunities to disadvantaged students and diverse backgrounds through increased public engagement, the use of placements, levy funded degree apprenticeships for zoos, and joint collaboration.

An appraisal found there to be no potential effects on other protected groups such as gender reassignment, sexual orientation, race, religion, caring responsibilities, pregnancy, and marriage/civil partnership. Promoting equality will continue to lie at the heart of the project. The effectiveness of the approach will be monitored, and a detailed Equality Assessment will be completed by the Lead Designer at RIBA 4 to ensure compliance with regulations.

Words: 332

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: [HBBC](#) will provide full weblink if bid is successful.

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PART 3 BID SUMMARY

<p>3a Please specify the type of bid you are submitting</p>	<p><input checked="" type="checkbox"/> Single Bid (one project)</p> <p><input type="checkbox"/> Package Bid (up to 3 multiple complimentary projects)</p>
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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).

Background

Twycross Zoo is one of the leading zoos in the UK and as a significant tourism attraction within the Midlands, is an economic driver within the Leicester and Leicestershire LEP. It is at the forefront of conservation, education, and research. The Zoo is committed to its award-winning education programme which aims to increase the awareness, knowledge and understanding of visitors about animals and their plight in the wild.

The Zoo has seen a significant turnaround and growth within the past 5 years from the launch of a strategic plan to deliver a £55M masterplan vision, which could be delivered faster with investment of public funds. A core element of the masterplan includes the development of the Twycross Life Sciences Park which will be a STEM Centre of Excellence. Initial investment committed of £8.4M to date has delivered important new habitats driving revenue and thereby allowing continued investment in research, education, and conservation in the Life Sciences Park.

However, the financial implications of the Covid-19 pandemic have meant the Zoo has entered survival planning and halted further ambitious development plans within the next stage of its masterplan.

Levelling Up Project

This Levelling Up Fund project will deliver a National Science and Conservation Centre (NSCC) at Twycross Zoo for a total project cost of £19.9m. Twycross Zoo will contribute 10% of funding as demonstrated in **Appendix A LUF Application Tables**.

The Centre comprises of a two-storey higher education campus building, a two-storey residential facility and an orangutan enclosure with associated external works within a 108,437 sqft structure as follows:

- Campus Building of 18,568 sqft
- Residential Facility of 12,368 sqft
- Orangutan Enclosure of 77,501 sqft

The NSCC will be a purpose-built centre located adjacent to Twycross Zoo. It will offer researchers from around the world the opportunity to study the 4 Great Apes, plus over 100 endangered species, in naturalistic complex environments whilst supporting conservationists and scientists with a world class facility. The centre will provide excellent teaching and research facilities (FE and HE), focussing on conservation; animal welfare; biosciences; STEM activities and public engagement with science. The centre will have both national and international appeal, including a unique 200-seater venue for scientific conferences.



The project will enable multiple partner universities, schools, and researchers to work together within an innovative facility. The higher education campus will enable new lines of academic investigation with international benefits for conservation and bio-cultural environments as well as the hosting of education programmes for partner universities and schools. The residential facility will home the researchers who are working full-time on-site or attending conferences within the NSCC. Additionally, the newly delivered orangutan enclosure will re-energise the cultural offering to ensure the area's major tourism asset recovers from Covid-19.

The delivery of the project will have wide-ranging benefits for jobs, research, education, and tourism in the area to enhance a community-focused development. This innovative facility will allow partners to exchange knowledge and resources. The idea is replicable across the country to made strides in research and university collaboration.

Word Count: 498

3c Please set out the value of capital grant being requested from UK Government (UKG) (£). This should align with the financial case:		£19.9m
3d Please specify the proportion of funding requested for each of the Fund's three investment themes	Regeneration and town centre	0%
	Cultural	100%
	Transport	0%

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

A letter of endorsement has been provided by Dr Luke Evans MP, elected as the Conservative MP for the Bosworth Constituency at the 2019 General Election. The letter is provided in **Appendix B Luke Evans MP Support** and highlights the importance of the bid. The local MP for the constituency states *"it cannot be underestimated that this national centre of excellence has the real potential to deliver exciting, relevant and tangible regional benefits for the East and West Midlands. With stakeholders from all levels of Government, political colours, the LEP for Leicestershire, Midlands Engine and Universities all backing the bid, I feel the final piece is the funding to make it a reality"*.

Additionally, separate letter of endorsements has been provided by numerous MPs across the Midlands. These are provided within **Appendix C Letters of Support**. This support emphasises the considerable economic and educational benefits the NSCC can bring to the entire region.

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)

The masterplan proposals have continued and grown support from several important stakeholders. These include LLEP in delivery of a key component of the Strategic Economic Plan, and from Hinckley and Bosworth Borough Council (HBBC), not only in their role as Local Planning Authority, but also linked with the impact in the local economy and driver for inward investment in the Borough. Direct engagement has also taken place with Leicester City and Leicestershire County Council who strongly support the bid. The project is included within their Tourism Growth Plan and destination marketing campaign 'Uncover the Story'.

Twycross Zoo has undertaken an extensive engagement programme with prospective partner universities and researchers. This consultation found the project has strong backing. Individual meetings were held with specific universities, before a group meeting was held with representatives from local universities to discuss the project. Attendees included the universities of Nottingham, Nottingham Trent, Birmingham, and Leicester, whilst support has also been provided by the universities of Oxford Brookes, St Andrews, Wolverhampton, Loughborough, UCL. Both St Andrews and UCL are currently supporting researchers and degrees on-site, which they aim to extend as part of the NSCC. Memorandum of Understandings (MoUs) have been agreed with multiple partner universities to provide

confidence to the plans. Universities provided quotations of support of the NSCC as follows, as well as Letters of Support in **Appendix C**.

A WORD FROM OUR UNIVERSITY PARTNERS

University of St Andrews
Professor Josep Call
 University of St. Andrews
 "The National Science and Conservation Centre is a truly exciting development. It has the potential to make Twycross Zoo a major international research hub in the area of primate cognition and behaviour."

Nottingham Trent University
Professor Edward Peck
 Vice-Chancellor, Nottingham Trent University
 "Nottingham Trent University is pleased to be a part of the development of a National Centre of Science and Conservation. Its location at Twycross Zoo offers a unique opportunity to combine multi-disciplinary expertise from Midlands institutions, to create a critical mass of knowledge in conservation and animal sciences."

Keele University
Professor Trevor McMillan
 Vice-Chancellor, Keele University
 "Keele University is delighted to be working with Twycross Zoo who have shown an impressive level of ambition to develop the zoo's role in global conservation and build public understanding of these issues. Keele is active in a number of areas of research relevant to the Zoo's work, not just in life sciences and veterinary studies, but also around public attitudes to nature and conservation, human impacts on habitat and animal health, and international relations."

University of Nottingham
Professor Shearer West
 Vice-Chancellor, University of Nottingham
 "A National Science and Conservation Centre based at Twycross Zoo would be a great boost for the Midlands – it would give us a UK and indeed European edge. The University of Nottingham is very keen to be involved – both our students and our research will benefit."

Loughborough University
Professor Robert Allison
 Vice-Chancellor and President, Loughborough University
 "I am delighted to see this important initiative coming to fruition. Twycross Zoo are at the heart of conservation and the new Centre will be one of the best examples of how world-leading research can inform and support the conservation agenda."

University of Birmingham
Professor Sir David Eastwood
 Vice-Chancellor, University of Birmingham
 "Working in partnership with Twycross Zoo, The University of Birmingham are honoured to be a part of this exciting journey as the award-winning charities growth has catapulted from humble beginnings to announcing the ambitious National Science and Conservation centre. Twycross Zoo's commitment will pave the way to being one of the UK's leading conservation charities."

Oxford Brookes University
Professor Linda King
 Vice-Chancellor for Research and Global Partnership, Oxford Brookes University
 "As Oxford Brookes University celebrates 20 years of Primate Conservation delivery and impact, we are looking forward to an exciting new collaboration that aims to create a STEM Primate Centre of Excellence. Combining in situ and ex situ research, teaching excellence and field work with a planned state of the art facility at Twycross Zoo, we will foster an interdisciplinary approach to primate conservation."

The planned scope of works has been informed by this engagement with the universities. Key aspects include within the plans:

- Development of PhD, MSc and BSc courses;
- Placement years and apprenticeships;
- Raising ratio of disadvantaged students;
- An open resource facility to enable collaborative research and jointly taught educational programmes;
- Inclusion of conference facilities for lectures and events;
- Identified need for residential facility to host researchers whilst they work on-site as this is currently a significant issue across the region and country;
- Specific research programmes within the campus building including primates, cognitive behaviour, veterinary practices and animal health, climate change, behavioural sciences, genetics, design of zoo facilities and native conservation species.

The use of the facility for schools will be hugely beneficial for the local community. Currently, Twycross Zoo welcomes over 60,000 of school children across a range of ages. Twycross Zoo has an award-winning Education Department offers a variety of discovery opportunities for many different types of groups across curriculum linked sessions within STEM projects. These partnerships have been developed and strengthened over several years. The schools

in the local area have been supportive of the plans, due to the increased learning benefits to students.

From an operational perspective both the British and European zoo associations; and the Association for Science Education support the development as a place of zoological conservation and learning. Economically, Twycross Zoo is a participant in LPL's Stay, Play and Explore programme and has associations with several hotels and accommodation providers who all benefit from increased visitor attraction to Twycross Zoo.

Numerous letters of support from key stakeholders are provided in **Appendix C**.

Word count: 492

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)

As set out above, the proposals are strongly supportive by the local community and key stakeholders. A key reason for this support is the substantial community benefits that will arise from the NSCC, including:

- Educational and teaching benefits to local schools;
- Enhanced opportunities for disadvantaged schools, students and visitors.
- Presence and collaboration of several nationally important universities within one location, which will bring positive spillover effects to the local economy;
- Wider tourism benefits to local food, entertainment and accommodation facilities;
- Increased community pride due to the international research activities within the facility.

The Zoo aims to extend its partnership with research, conservation, and education institutions as part of the NSCC. As well as the education partnership identified in 4.2a, the Zoo already has research campaigns with the Ape Heart Project and the Frozen Ark, as well as conservation collaborations with the Ape Action, Fauna & Flora International, Lola ya Bonobo and Wildlife Vets International.



Despite this, the Zoo does currently create transport congestion within the local road network during its peak seasons. This congestion typically arises on the A444 as visitors access the facility. The proposals for the NSCC and the wider masterplan includes specific access measures to ease these constraints. They have been incorporated into the masterplans to directly mitigate these impacts. As part of this, a new right turn is being installed to prevent any traffic and improve safety whilst accessing the facility.

Word count: 492

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

- Yes
 No
 N/A

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

- Yes
 No
 N/A

4.3 The Case for Investment

See technical note Table 1 for further guidance.

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

Environmental crisis

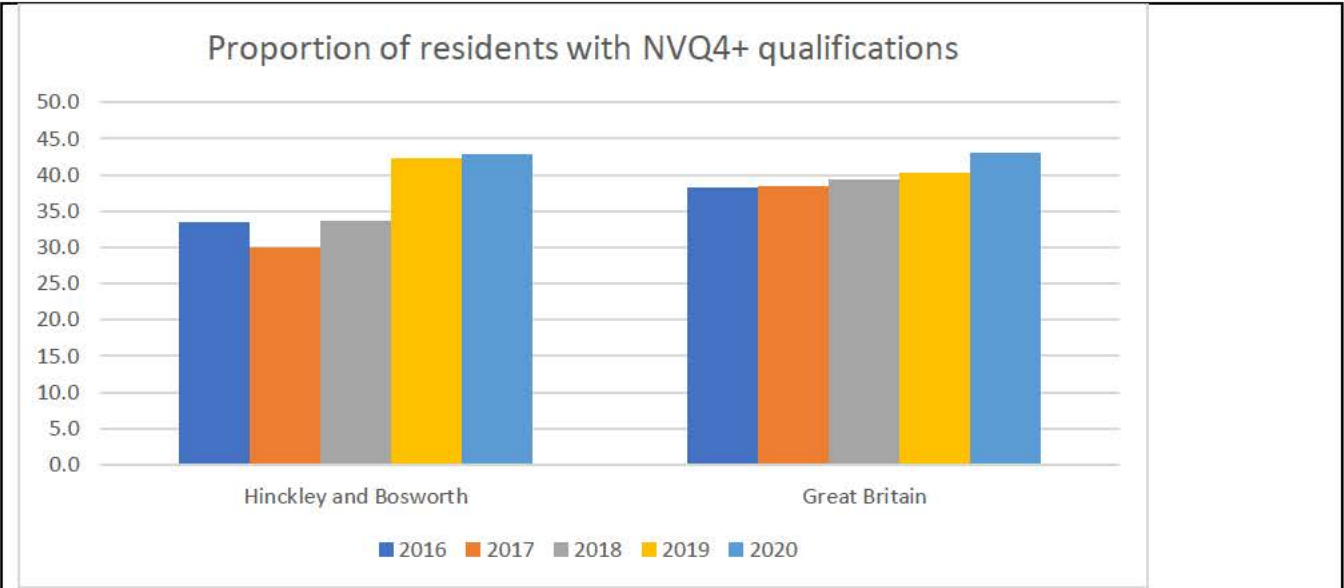
As the impacts of climate change and human exploitation of the natural world become more apparent, Twycross Zoo is at the forefront of conservation, education, and research. The zoo's vision is to lead the global zoo conservation efforts in captive breeding of endangered species whilst supporting efforts to protect wild populations and to deliver STEM training at an international level to train the next generation of conservation leaders.



Action is what is needed now, and this facility will support conservationists and scientists within a world class facility when they need it the most to be able to impact our global crisis.

Education

Despite numerous universities within the Midlands, the Hinckley and Bosworth local authority does not have a higher education presence. This lack of provision appears to have led to a lower proportion of residents being qualified to NVQ4+ than national averages, as residents must travel elsewhere for this education. Additionally, a lack of collaboration between universities is a common issue preventing significant strides in research and development. The NSCC has the potential for at least seven universities to jointly teach programmes.



The proposals to increase engagement with local schools is also required, as the proportion of residents in HBBC with no qualifications is greater than regional and national averages. In addition, both the borough and LLEP are in the bottom 40% for the education, skills, and training sub-domain of the IMD rankings. Twycross Zoo have many active engagements with poorly performing schools across the borough and Midlands, as part of a plan to level up the educational support in the whole region.

	HBBC	LLEP	East Midlands	Great Britain
Proportion of residents with no qualifications (2020)	7.7%	7.4%	6.3%	6.4%

Productivity

These skill deficiencies in parts of the borough, as well as residents moving out to access higher education, has led to a productivity gap for Hinckley and Bosworth despite its well-performing economy. The borough has low unemployment rates however, its GVA per head is comfortably below regional and national averages. The area requires new high-value opportunities to be generated to stimulate real economic growth. The NSCC is a cutting-edge facility which will support highly valuable research activities which will have substantial spillover benefits for the local area.

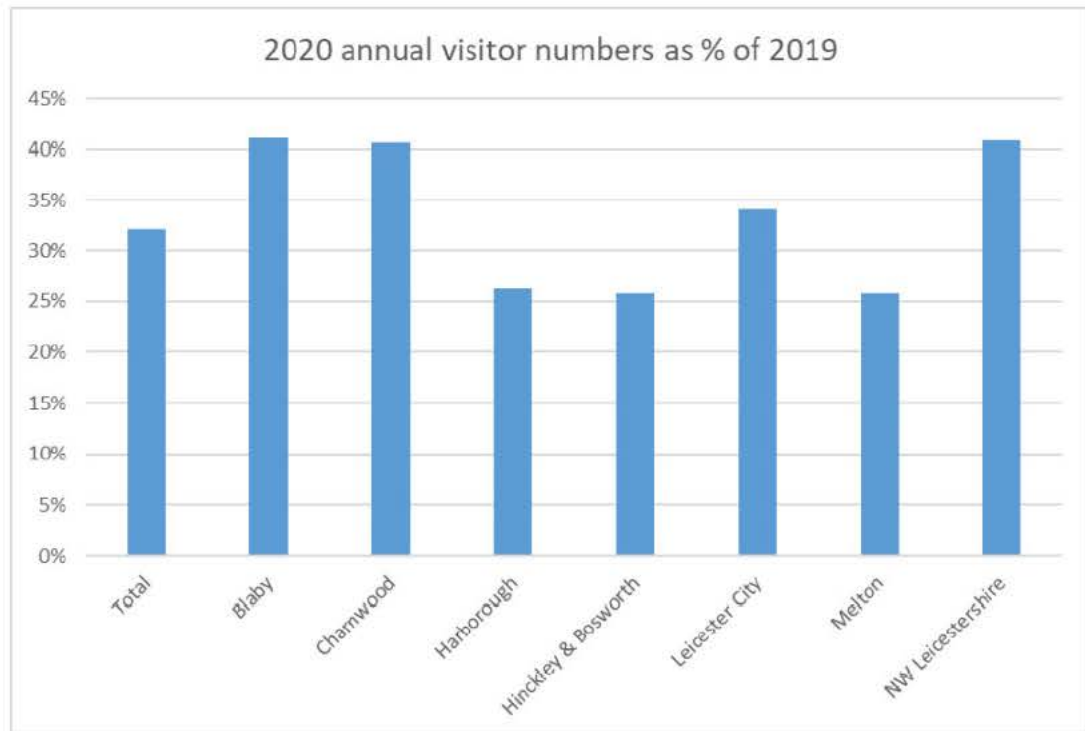
	HBBC	East Midlands	Great Britain
2018 GVA per head (£)	20,610	22,851	28,753

Tourism

Specific issues related to tourism include:

- **An ageing local population** – Zoos find it more difficult to attract older people. As demographics change, Twycross Zoo must maintain its engagement and attraction across many demographics to ensure its survival, including bringing in visitors from further afield.
- **Cultural capital** – Twycross Zoo aims to strengthen its cultural capital and become a major national attraction with over 1 million visitors annually, generating sufficient revenue to be financially stable.
- **Covid-19** – Attractions in HBBC were significantly affected than across the region. However, since reopening, Twycross Zoo's mid-week visitation has increased versus the same point in time in 2019. The County's Tourism Growth Plan aims to 'back our

winners', of which the NSCC is one. Twycross Zoo must ensure an attractive visitor offer to accommodate higher numbers of visitors.



Words: 481

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

Without investment capital for development of key infrastructure and the next phase of the masterplan at this stage, visitor number growth will diminish, plateau, and ultimately decrease as Twycross Zoo will not be able to compete with local and regional competitors. This fall in visitor numbers will equate to a decrease in revenue which will lead to business failure, with associated job losses and loss of significant economic contribution to the region.

More specifically in the short term, Twycross Zoo is now at a point its infrastructure must be addressed in order to support both capacity for the current growth, and also its essential reputation as a national tourist attraction and Centre of Excellence in Life Sciences.

The specific market failures are:

- Externalities – wider benefits will be generated through the creation of the NSCC at Twycross Zoo however, this is not factored into market decision;
- Imperfect information – buyers and sellers cannot make informed decision on the potential of the Market previously due to lack of information;
- Information failures and risk- investing in growth is by definition an uncertain business. There may be concerns relating to, for example, whether there is a market for the proposed services of the centre.

- Public goods – enhancing public spaces are typically underprovided as they are non-excludable in supply and non-rival in demand;
- Coordination problems – there are a number of potential beneficiaries which can act as a barrier to development as they act individually.

Words: 238

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)

Intervention

As set out in the bid summary, the project proposes to invest in the following:

- Construction of Campus Building – which will form a two storey higher education centre to sustain and enhance the educational and research offer of Twycross Zoo programmes
- Construction of Residential Facility – which will create 12,368 sq ft of residential space to accommodate researchers on long-term programmes
- Construction of Orangutan Enclosure – to retain and develop the zoo's position at the forefront of primate research and conservation
- Net Carbon Zero works – to ensure all buildings are energy efficient and environmentally sound
- Supporting external works- a range of works to be completed during the construction phase including electrical power upgrades

Alignment of interventions to challenges

Based on the evidence of local challenges, the main themes these interventions will look to address are:

- Sustaining Twycross Zoo as an important education and tourism asset and focal point in the area;
- Strengthening the cultural and leisure offer;
- Improving pathways to research and educational facilities; and
- Provision of world-leading research and conservation facilities.

A number of measurable objectives will support evidence of successful delivery of the project. Initially the development and construction of the project within programme and budget will be the direct measurable of performance. Within 12 months of opening of each facility a measure of impact on visitor numbers will be evident which can be monitored and compared against both projections and also corresponding periods within previous years. As both volume and unit price are variables impacted by the opening of the new facility the revenue growth will ultimately be the measurable indicator of performance.

Rationale

It is expected that the interventions will align with the identified challenges as follows:

- Campus Building together with Residential Facility will directly response to the global environment crises, education and productivity issues in the local area;
- Orangutan Enclosure will directly stimulate a recovery to the identified tourism and Covid-19 related economic challenges;

- Net Carbon Zero works will response to the global environment crises; and
- The supporting external works will ensure the NSCC is a cutting-edge, high-quality facility that mirrors its vision.

Therefore, the proposals have been created to directly address market issues. The NSCC will be in partnership with seven leading universities to lead new research, signalling the nationally significant science and education destination. The inclusion of new meeting and conferencing facilities at the heart of the Midlands and accessible from the M42 motorway will stimulate new business activity and grow HBBC's economic pull. Lastly, the unique tourism facilities will ensure Twycross Zoo remains a main attraction in the area, engaging with new visitors and expanding its catchment.

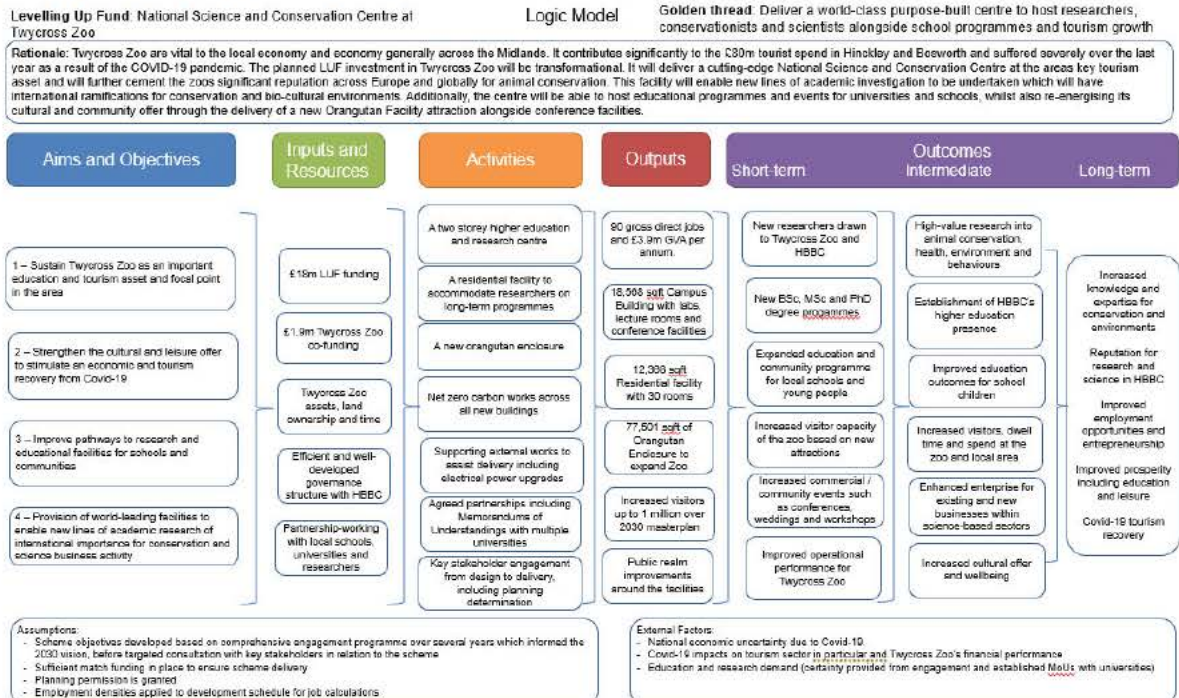
Words: 430

4.3d For Transport Bids: Have you provided an Option Assessment Report (OAR)

Yes
 No

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

The Theory of Change for the NSCC project is shown below and is included in **Appendix D**. A summary is provided thereafter.



The socio-economic context of the project is as follows:

- Impacts of climate change and human exploitation of the natural world are becoming more apparent; national assets need to lead global conservation efforts to make meaningful change;

- Lack of higher education presence in HBBC;
- Demand for the NSCC facility from universities, including a need for a residential facility to host researchers who are observing the animals on long-term programmes.
- Linked to this, HBBC suffers skill shortages in certain areas, leading to productivity issues compared to the region and country;
- Tourist sector require stimulation to overcome challenges such as an ageing local population as well as the severe Covid-19 impacts on cultural facilities

Through the £18m LUF funding and £1.9m Twycross Zoo co-funding, combined with the land and assets already in the Zoo's ownership, the specified NSCC intervention will be delivered by 2024. Twycross Zoo have well-established project governance arrangements with HBBC to ensure smooth delivery. Additionally, Twycross Zoo have undertaken an extensive engagement programme to ensure there are strong partnerships in place with local schools, universities and researchers. Through these resources, the following outputs will be delivered:

- 18,568 sqft Campus Building with labs, lecture rooms and conference facilities;
- 12,368 sqft Residential Facility with 30 rooms;
- 77,501sqft Orangutan Enclosure to expand Zoo;
- Public realm improvements around the facilities;
- Contribution to 1 million visitors by 2030 as part of overall masterplan;
- 90 gross direct jobs and £3.9m GVA per annum.

From these outputs, the following outcomes will be realised:

- Campus Building (with Residential Facility to host researchers)
 - Short term: New researchers within Zoo and HBBC; New MSc and PhD degree programmes; expanded education and community programme; increased commercial events such as conferences and functions; improved operational performance
 - Medium term: High-value research into animal conservation; establishment of HBBC's higher education presence; improved education outcomes for school children; enhanced facilities for businesses in science-based sectors
 - Long term: Increased knowledge for conservation and environment; reputation for research and science in HBBC; improved employment opportunities and entrepreneurship; improved prosperity including education and leisure
- Orangutan Enclosure (and supporting public spaces)
 - Short term: increased visitor capacity of the zoo; expanded education and community programme for young people; improved operational performance
 - Medium term: Increased visitors, dwell time and spend at the zoo and local area; improved education outcomes for school children; increased cultural offer and wellbeing
 - Long term: Covid-19 tourism recovery; Improved prosperity including education and leisure

(words: 420)

4.4 Alignment with the local and national context

See technical note Table 1 for further guidance.

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

The bid is aligned and supported by the following local strategies:

The project is listed in the **Leicester and Leicestershire SEP** and is of strategic importance for the region. It will create employment and investment through site development, construction and resulting operations. Development of education and science elements will attract scientific funding into the area. Enhancement of skills development, education and training in the region will increase employability, reducing unemployment and increasing revenue for reinvestment in the area. This will attract more visitors from the region and further afield, contributing to regional economic growth. The investment and growth of Twycross Zoo is consistent with the objectives of the SEP. Growth over the last 5 years has demonstrated its performance towards these objectives.

The **Hinckley and Bosworth Corporate Strategy 2017-21** Prosperity theme states the council will support its tourism partners in promoting its local attractions and will boost tourism through its Tourism Strategy. The Places theme states the council will also support and celebrate its cultural and heritage facilities and events. The Annual Statement of commitment 2019/20 under Prosperity refers to working with tourism partners to support increased investment in the key tourism destinations such as Twycross Zoo.

The **North Warwickshire and Hinckley and Bosworth Destination Management Plan 2017-22** refers to actions to support the development of Twycross Zoo through financial assistance and attracting development consultancy support. The Plan's priorities for achieving tourism growth state a key priority to be the progression, and if possible, acceleration, of the development plans for Twycross Zoo.

The council **Economic Regeneration Strategy 2021–2025** under the themes of Places and Tourism refer to working with tourism partners to deliver Tourism Growth Plans and supporting local businesses in their bids to Government for funding support to help sustain them through recovery from COVID19.

Hinckley & Bosworth Tourism Partnership Tourism Strategy 2013–2018 details key strategic priorities for developing tourism in the borough and outlines an action plan for marketing development. A key tourism attraction that is identified is the zoo:
'Twycross Zoo – The World Primate Centre. More than just a zoo, Twycross is dedicated to preserving threatened species whilst providing education, study and wonder for visitors. Increasingly, Twycross is developing and evolving as a tourism hub for the region and sub-region. They are also a popular conference, events and wedding venue.'

The **Leicester and Leicestershire Economic Partnership Tourism and Hospitality Sector Growth Plan 2015-2020** within its actions includes supporting major inward investment into the tourism and hospitality sector.

The **Hinckley and Bosworth Cultural Strategy** at Theme 4 refers to valuing and promoting Tourism.

The current **local plan** (Core Strategy and Site Allocations) designates the zoo as a cultural and tourist facility and supports its role mainly as a tourist destination. The emerging local plan is seeking to establish a special policy area for the zoo which will help support not only its function as a tourist facility but also its plans as a centre for research and education. The draft text from the emerging plan is below – the emboldened being the policy whilst the normal text is supporting text.

CLT04 Twycross Zoo

Within the Twycross Zoo Special Policy Area as shown on the Policies Map, proposals for the following will normally be supported:

- a. Developments directly related to the zoo as a visitor and tourist facility***
- b. Proportionate facilities related to life sciences and animal conservation, research and education***

Twycross Zoo is the largest conservation zoo in the Midlands and is a major tourism asset attracting over 660,000 visitors in 2019. Development that provides enhanced visitor opportunities will be supported. The Zoo also has ambitious plans to become a recognised 'European Centre of Excellence' by expanding its education, research and teaching facilities to include a National Science and Conservation centre. Facilities related to education, research and teaching will be supported where these are proportionate to the zoo itself.

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 project aligns directly with multiple UK policy objectives as follows:

- **Global Britain:** In the face of Brexit, the UK wishes to “continue to be open, inclusive and outward facing; free trading; assertive in standing up for British interests and values; and resolute in boosting our international standing and influence”. Twycross Zoo has a national reputation and draws visitors from afar. The promotion of this asset will deliver new opportunities for research and tourism.
- **Net zero carbon legislation:** the project will deliver clean growth which contributes to the UK target of net zero emissions by 2050 through a strong coordinating role to maximise benefits and mitigate potential impacts. Specific measures are identified to support the decarbonisation of the construction to ensure all buildings achieve Net Zero Carbon.
- **Climate change:** Impacts of climate change and human exploitation of the natural world are reaching breaking point. NSCC is a direct response to. Through this facility, Twycross Zoo will lead scientific breakthroughs to improve environments globally.
- **Levelling up:** As signalled by this Fund, the Government has a significant commitment for regional growth to support 'levelling up' across the country. This project supports levelling up the area's education and skills provision through extensive outreach with deprived schools.

- **Covid-19 recovery:** The coordinated intervention will accelerate a much-needed stimulation to one of Hinckley and Bosworth’s main economic assets, driving growth throughout the area and becoming an exemplar project for the area as part of the country’s effort to ‘Build Back Better’.

(Words: 241)

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

The project improves a crucial economic and tourism asset for the area. Leicester and Leicestershire’s Tourism Growth Plan identifies Twycross Zoo’s 2030 vision, including the creation of a National Science and Conservation Centre, as one of the nine winners the City Council are supporting. These high-profile, ambitious regeneration and infrastructure projects have the potential to deliver great quality experiences, drive additional visitors, extend visitor stay, increase visitor spend and create new jobs. They will help add breadth and depth to the destination, widen its appeal to new audiences and sell our area more powerfully and distinctly in the marketplace. Other winners include National Space Centre Vision 2025, Roman Leicester at Jewry Way, Great Central Railway, Heart of Forest Vision.

The LUF investment into the NSCC will continue the progress towards Twycross Zoo’s 2030 masterplan. Around £10 million has already been invested into this programme over the first five years, with £0.5 million of this being awarded to the Zoo by LLEP. This project, therefore, will directly link to the previous LEP investment to continue the growth of this key facility for the area’s economy. Further LEP funding has been explored but finance is not available at this time.

The intention for the NSCC, once operational, is for university partners to bid to UK Research and Innovation for major capital funding. MoUs have been signed with the universities regarding these partnerships and future intentions. It is therefore expected that the LUF funding will help to leverage further UK R&I funding over the long-term to ensure its continued development and sustainability.

(words: 260)

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

N/A as not transport project

PART 5 VALUE FOR MONEY

5.1 Appropriateness of data sources and evidence

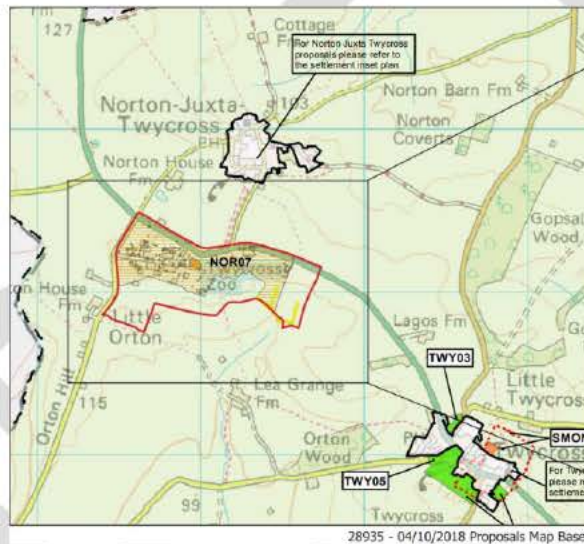
See technical note Annex B and Table 1 for further guidance.

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)

Context

The Borough Wide Proposals Map shows the extent of the Special Policy Area (NOR07) supporting zoo related development. Within the new Local Plan, the Council is expected to extend the Special Policy Area boundary to include areas to the south.



Economic sectors

The sectoral split of the employment in HBBC shown below demonstrates a relative lack of opportunities in high-value sectors (J, K, M, N) compared to either the rest of the LEP or country. HBBC also supports proportionately fewer jobs in the education sector, resulting from a lack of higher education provision.

BRES 2019	HHBC	LLEP	East Midlands	Great Britain
1 : Agriculture, forestry & fishing (A)	2.0%	1.2%	1.8%	1.6%
2 : Mining, quarrying & utilities (B,D and E)	3.9%	2.0%	1.6%	1.3%
3 : Manufacturing (C)	17.8%	13.1%	12.5%	7.8%
4 : Construction (F)	5.0%	4.4%	4.8%	5.0%
5 : Motor trades (Part G)	2.8%	1.8%	1.9%	1.9%
6 : Wholesale (Part G)	5.6%	5.6%	5.4%	3.8%
7 : Retail (Part G)	8.9%	8.6%	9.3%	9.2%
8 : Transport & storage (inc postal) (H)	6.7%	5.8%	6.0%	4.8%
9 : Accommodation & food services (I)	6.7%	5.8%	6.7%	7.6%
10 : Information & communication (J)	1.8%	2.2%	2.3%	4.2%
11 : Financial & insurance (K)	1.1%	2.0%	1.7%	3.4%
12 : Property (L)	1.3%	1.6%	1.6%	1.9%
13 : Professional, scientific & technical (M)	8.9%	9.2%	7.6%	8.8%
14 : Business administration & support services (N)	7.8%	7.8%	8.2%	8.7%
15 : Public administration & defence (O)	1.3%	4.2%	3.7%	4.2%
16 : Education (P)	7.8%	10.2%	8.8%	8.4%
17 : Health (Q)	6.7%	9.8%	11.6%	12.8%
18 : Arts, entertainment, recreation & other services (R,S,T and U)	4.4%	4.6%	4.7%	4.5%

Productivity

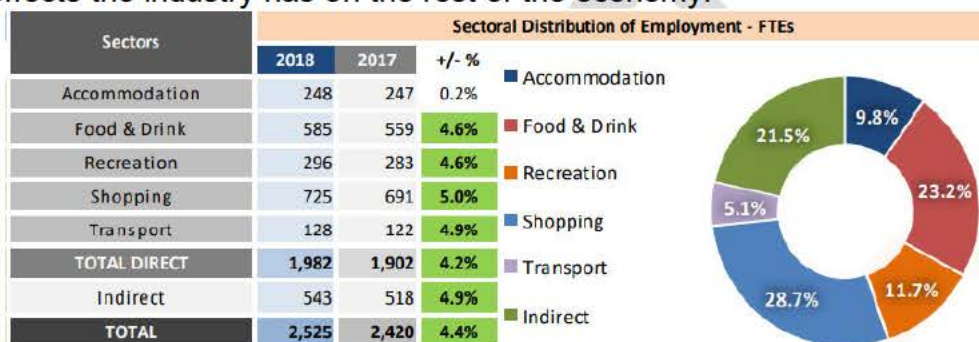
The lack of opportunities in high-value sectors, combined with a high proportion of residents with no qualifications compared to national average, has resulted in a productivity gap for Hinckley and Bosworth despite its well-performing economy.

	HBBC	LLEP	East Midlands	Great Britain
Proportion of residents with no qualifications (2020)	7.7%	7.4%	6.3%	6.4%

	HBBC	East Midlands	Great Britain
2018 GVA per head (£)	20,610	22,851	28,753

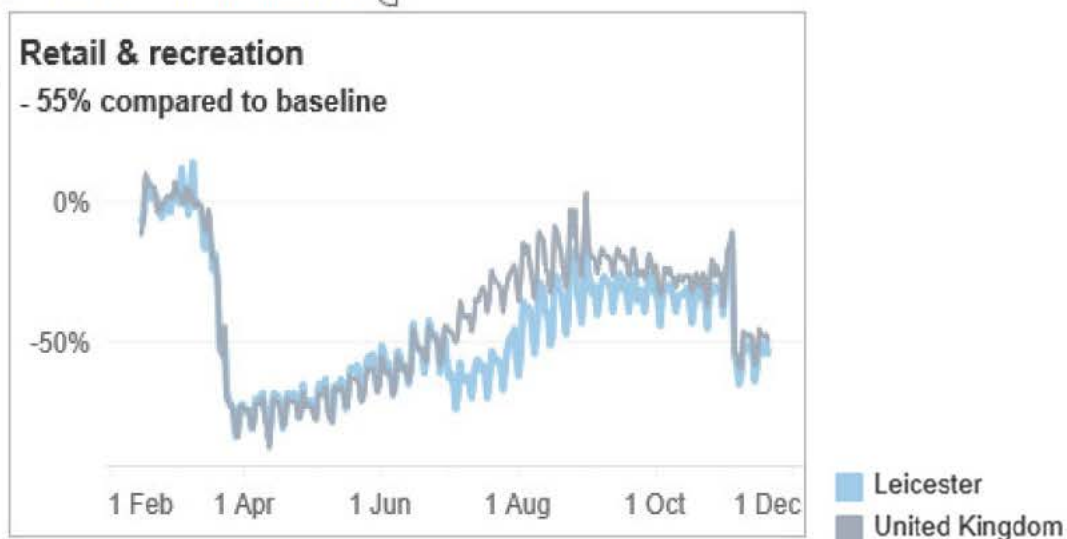
Tourism

The sectoral distribution of tourism employment in Leicestershire is demonstrated below. This demonstrates the growth of the industry in the area, as well as the spill over effects the industry has on the rest of the economy.



Covid-19

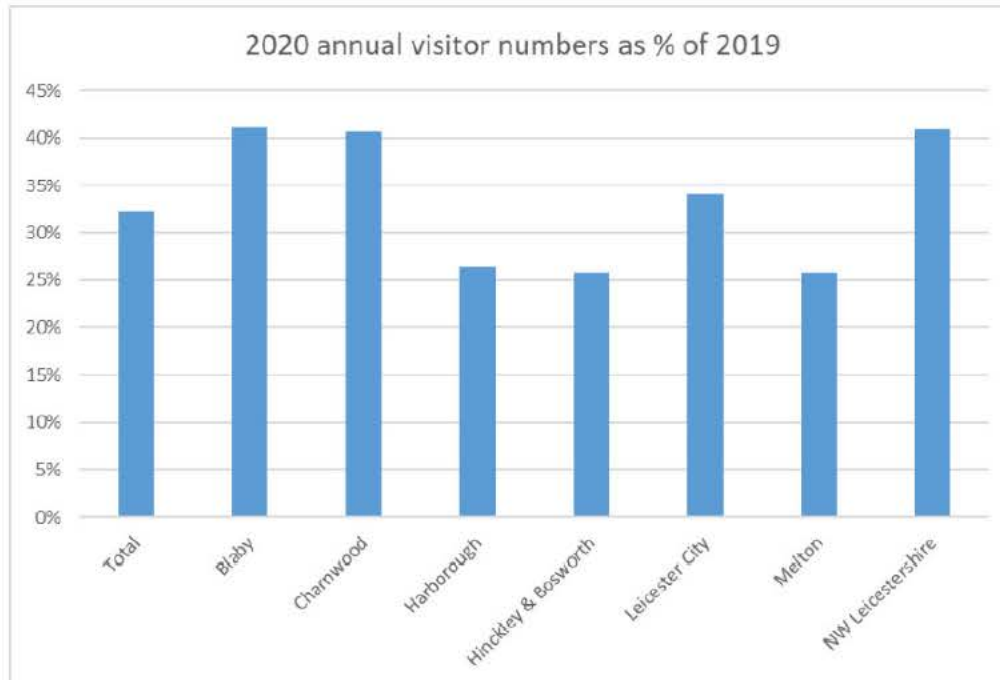
Leicester was placed under additional lockdown conditions when restrictions in the rest of the country began to ease. Long-term economic Covid-19 implications are, therefore, greater in this area.



This has led to the area's tourism sector shrinking by over 60% from 2019 to 2020.

Leicester and Leicestershire, STEAM report	2012	2013	2014	2015	2016	2017	2018	2019	2020	% change on 2019
Combined Value (£bn)	1.395	1.481	1.571	1.675	1.762	1.82	1.88	1.962	0.702	-64.20%
Combined jobs	19,604	20,485	20,716	21,441	22,032	22,433	23,076	22,714	8,440	-62.80%
Combined Visitor Numbers (million)	28.69	29.45	30.41	32.18	33.39	33.77	34.93	35.37	11.89	-66.40%

HBBC visitor numbers were particularly hit by the lockdowns. Around 89% of visitors to Leicestershire are day visitors, meaning tourism was hugely affected by the local lockdowns to Leicester and surrounding areas.



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)

Up to date sources

A robust evidence base is required to provide a comprehensive understanding of local context and to articulate local strengths, challenges, and opportunities in order that interventions are targeted appropriately to meet need and gaps in existing provision. The evidence base has been gathered through desktop research, supported by case studies and consultation documents.

A range of publicly available sources, documents, and web-based applications have been used including the following latest sources as shown by their date of publication:

- Annual Population Survey (2020),
- Business Register and Employment Survey (2020),
- Index of Multiple Deprivation (2019)
- Levelling Up Fund: Prioritisation of places methodology note (2021)
- ONS GVA by Local Authority statistics (2018,
- ONS Claimant Count (2021)
- STEAM Economic impact report for tourism (2020)
- STEAM headline data (2010-2020)

- Leicestershire Covid-19 Survey Impact Report (2020)
- Twycross Zoo visitor numbers (2020)
- Google mobility data (2020)

Robustness and unbiasedness of data

To ensure robustness, multiple sources have been examined to verify the same conclusions are arising. Additionally, the combination of data sources allowed local problems as well as sub-local patterns to be examined. The broadly public data sources can be collated to demonstrate a clear and robust picture of the main issues facing HBBC, whilst the bespoke sources illustrate issues facing the local tourism sector and Twycross Zoo's role in this. In addition, certain public sources, such as IMD and Annual Population Survey, allow sub-local areas to be examined to cross-check findings from reports and engagement. This approach can be seen above, with multiple government resources supported by specific studies into the local area and development in question.

The robustness and unbiased of evidence presented from official public sources has been continually verified before submission, considered the primary resource for data in the UK for its thoroughness. This data has also been cross-referenced against each other during our research to ensure similar findings arise from, for example, the APS and claimant count compared to the rankings in the IMD. This exercise found the same conclusions arising in terms of the multiple issues in the borough for productivity and skills.

In terms of the professional reports utilised, multiple methods were used to ensure their robustness and unbiasedness:

- The reports present their methodology, which has been cross-examined by economic and business case specialists from AMION Consulting.
- The professional reports and surveys can be assured against office public sources, for example, the STEAM data showed a similar sectoral split to the BRES data, whilst the decline in value and employment in the tourism sector according to the STEAM report reflected the issues found within Claimant Count or Annual Population Survey. Additionally, the Google Mobility data can be cross checked against other reports on footfall in Leicester versus the rest of the country.
- The data provided by Twycross Zoo only relates to visitor numbers, which typically are made publicly available. AMION Consulting's Visitor and Leisure team have reviewed these calculations as part of the value for money assessment.

Lastly, a thorough and extensive engagement process including AMION, Twycross Zoo, HBBC and key stakeholders has been undertaken to assure the findings from different resources are unbiased and mirror specialist local knowledge.

(Words: 490)

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

Of key importance assessing the employment and economic impact of the proposals on the local economy is the extent to which new activity is truly additional, in other words it does not simply displace existing activity. It is important to understand who is likely to benefit from the impacts generated and the degree to which further demand and investment is stimulated. This additionality assessment informed the area of influence and thus the geographical level of data and evidence within this bid.

The gross economic benefits for employment and gross value added (GVA) have been presented at a national level, whilst the net economic benefits are presented at the local level. A key factor within the anticipated local additionality of the proposed project options is leakage – the proportion of outputs that benefits those outside the project's target area or group.

Origin-destination data from Census 2011 indicates that over half of workers in HBBC also live in the area. Additionally, data from Leicester City Council and Leicestershire County Councils demonstrate that 89% of visitors to Leicestershire are day visitors, meaning that tourism draws heavily from its local area. Therefore, for the purposes of this assessment, the local additionality of the proposals has been considered at the Hinckley and Bosworth Local Authority Level.

Due to this, the data and evidence has been predominantly presented at the Hinckley and Bosworth where possible, with comparisons provided against the LEP, regional, and national averages where appropriate.

(Words: 240)

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)

Evidence and projections

Projections within the business plan forecast continued growth in revenue following development of the phases of the masterplan. Education is predicted to show an increase of 5% year on year. Revenue Growth is forecast to increase by 5% year on year. Increase in visitor numbers is predicted for 6% year on year. Additionally, over 250 jobs (FTE) will be safeguarded over this period due to the continued success of the Zoo. These calculations demonstrate that Twycross Zoo has the potential to address the education and skills issues in the local area, as well as driving an economic recovery from Covid-19 through increased visitor numbers and spending.

An independent Economic Impact Assessment demonstrates that there is a 21% return on investment. Based on STEAM data visitors to the zoo spend approx. £3.25M per annum outside the zoo. Total direct and indirect expenditure

demonstrated by current visitor level approximates £4.35M annually (equates to more than 80 FTE jobs). Post-development this would rise to £6M total external expenditure annually and further 50 – 100 jobs externally. These numbers will increase again in the 2018-2022 period if investment continues. The economic rate of return at 21% is higher than the financial rate of return on the investment of 10.9% reflecting the external benefits of the zoos development for the East Midlands in terms of jobs generated by expenditure of zoo visitors outside the zoo (accommodation, restaurants, travel shopping).

Tourism is worth over £120 billion to the UK economy, equivalent to 9% of the UK domestic product. This sector is growing faster than the main UK economy. Deloitte estimates the tourism GVA multiplier to be 2.8 meaning that for every £1,000 generated in direct tourism GVA there is a further £18,000 that is supported elsewhere in the economy through the supply chain and consumer spending.

Twycross Zoo offers a realistic, achievable opportunity to lead the tourism economy in the region. The “attract and disperse” model is well-proven within the tourism sector i.e. create a major hub from which many other businesses will grow and prosper. Twycross Zoo represents such untapped potential in the region, ripe for investment and major growth.

Approach to quantifying impacts

The types of economic impacts considered and quantified take account of these factors with guidance-based additionality being one of the most important approaches used. Taking the impacts arising from the creation of the facility, for example, these capture the additional impacts with respect to jobs and Gross Value Added (GVA) that the LUF intervention will generate. It is important to identify the deadweight position (the outcomes that will be realised without intervention) before quantifying the impacts that will be achieved over and above this. Displacement, leakage, and multiplier factors are also taken account before the final additionality totals are quantified. These are reported in monetary (e.g. additional GVA) and quantitative (e.g. additional employment) terms in the analysis with additionality-compliant monetary benefits also included in the Benefit Cost Ratios (BCRs) reported below.

(Words: 492)

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)

[Redacted content]

[Redacted text block containing multiple paragraphs and bulleted points]

(Words: 492)

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)

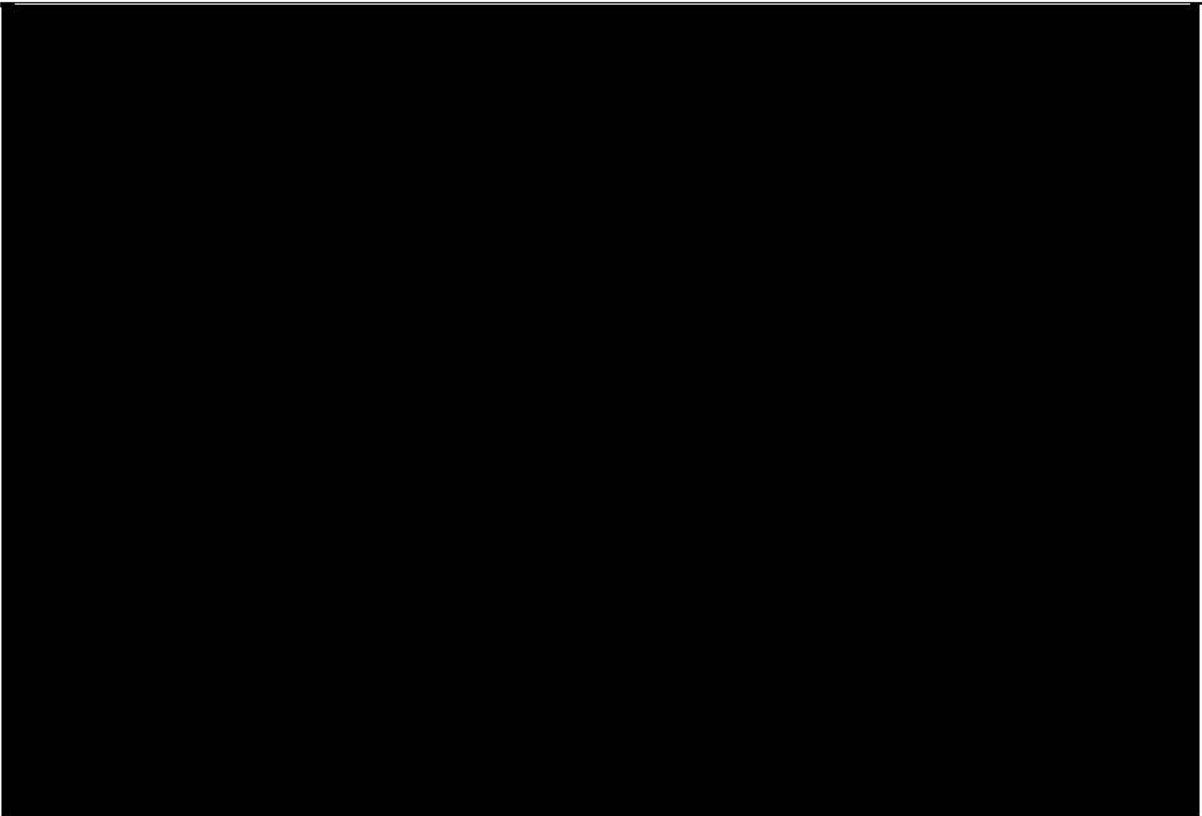
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¹ GDP deflators at market prices, and money GDP, HM Treasury, 30th September 2019.



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[Redacted]

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[Redacted]

[Redacted]

(Words: 426)

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)

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted text block containing multiple paragraphs and bulleted points]

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(Words: 688)

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)

Please see completed Tabs A and B in **Appendix A LUF Application Tables**.

5.5 Value for money of proposal

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

[Redacted text]

(Words: 205)

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

Building upon the analysis of unquantifiable effects, an assessment of the wider benefits associated has been undertaken through a scoring and weighting framework. Potential wider benefits include:

- **International innovation spillovers:** The project will allow researchers from around the world the opportunity within a world-class facility. These activities will result in significant potential advances in knowledge for these species, conservation, and net zero carbon practices internationally.
- **Community and wellbeing:** Twycross Zoo already have an extensive community outreach programme that improves the sense of place in the area. The LUF investment into the NSCC will expand this, by ensuring the education outreach extends to even more socially deprived areas across the Midlands.
- **Agglomeration:** a consistent feature of modern economies is the concentration of economic activity in certain locations. The delivery of an innovative R&D facility alongside a key economic and tourism asset will result in agglomeration benefits for the surrounding area and supply chains.

- **Image and reputation:** the scheme will deliver a high-value R&D facility, alongside further leisure facilities, to greatly enhance the image of the area as a business location and tourism destination.
- **Regeneration:** the proposals would contribute heavily to the continued regeneration of Twycross Zoo, linking to the overall planned masterplan for the facility to ensure it remains a focal tourism asset for the region.

The intervention is likely to deliver significant additional benefits in all these areas above the Do Nothing, particularly international spillover, agglomeration and community.

Weighting and scoring of the qualitative benefits					
Wider benefit	Weight	Do Nothing		Intervention option	
		Score	Weighted score	Score	Weighted score
International knowledge spillover	30%	3	0.9	10	3.0
Agglomeration	30%	6	1.8	9	2.7
Community and wellbeing	20%	7	0.7	9	1.8
Image and reputation	10%	6	0.6	8	1.6
Regeneration	10%	5	0.5	8	1.6
Total	100%	27	4.5	44	8.7

(Words: 238)

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)

[Redacted content]

[Redacted content]

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)

[Redacted content]

(Words: 241)

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.

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

Yes

No

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

Match funding has been committed by Twycross Zoo. A letter confirming the Zoo's funding commitment is attached in **Appendix F**.

Subject to securing the full allocation of Levelling Up Funding as outlined within this application, there are no funding gaps.

(Words: 40)

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)

The availability of public sector funding from the Levelling Up Fund is critical to the delivery of the NSCC. Without this funding, the project will not be able to come forward. Twycross Zoo have explored alternative funding sources such as from Leicester and Leicestershire LEP (LLEP) and public research pots. The project has been well-received and supported, including its status within the pipeline of schemes to come

forward according to the LLEP, however; these funding sources do not have sufficient monies to support the project. The quality of the project was not in question, purely the availability of sufficient finance from the LEP. Therefore, the availability and confirmation of the finance from the Levelling Up Fund is the only mechanism to deliver the project as part of a Covid-19 recovery.

On behalf of the project, universities have put forward applications to Research England Development Fund (RED). These applications have not been for funding but rather to receive feedback on the scheme. These findings have been incorporated into the project plans to ensure the proposals directly align with strategic research ambitions and national objectives within the Industrial Strategy. The intention for the NSCC, once operational, is for university partners to bid to UK Research and Innovation for major capital funding and RED funding. MoUs have been signed with the universities regarding these partnerships and future intentions. It is therefore expected that the LUF funding will help to leverage further funding in the future to ensure the NSCC's continued development and sustainability.

(Words: 250)

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

The estimated construction costs for the NSCC have been calculated by Baker Mallett. Baker Mallett are quantity surveyors who provide services to the property and construction industry, with a reputation built on consistent and cost-effective project delivery.

Based on their advice, on top of the capital construction costs, allowance has been made for achieving net zero carbon, due diligence works and surveys, as well as design team fees. An allowance of 10% has been applied to the overall project development to cover contingency and project risk. Generally, a project of this size, complexity and at RIBA Stage 1, they would expect the contingency/risk range to be anywhere between 7.5% and 12.5%. Therefore, in consideration of this, they have allowed a contingency/risk allowance of 10%.

Twycross Zoo is a registered charity (number 501841) which exists to support conservation, education and research. Any income from the project will be used to support these vital streams, as well as reinvested into the facility to help the recovery from the substantial Covid-19 impacts.

(Words: 169)

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)

Risk overview

Risk management is a process that allows individual risk events and overall risk to be understood and managed proactively, optimising success by minimising threats and maximising opportunities.

The main risks to the project and their mitigation measures have been summarised in **Appendix G Risk Register**. The key objective of the Risk Register is to apply pre-assessed and documented risk management procedures to specific, identified hazards. The information provided with the Risk Register, including the allowances made for risk, provide a much greater understanding of basic costs and the cost of risk transfer.

Risks have been assessed using judgements in relation to the probability and impact of each risk item. A score of 0 (very low) to 5 (very high) has been given in each case to probability and impact respectively, with the risk score being the product of probability and risk. The risk matrix is presented below.

		IMPACT				
		Insignificant	Minor	Moderate	Major	Catastrophic
		1	2	3	4	5
PROBABILITY	5. Very high					
	4. High				HIGH	
	3. Medium			MEDIUM		
	2. Low	LOW				
	1. Very low					

Financial risks

The key risk to the project is clearly the availability of finance. This needs to be confirmed at an early stage to ensure any Twycross Zoo investment in pre-development is on the basis that funding to support delivery is achievable.

The delivery of the facility itself is underpinned through ownership, planning compliance and surety of operation. This leaves the actual delivery within the budget and programme the key risk to be managed. The delivery team is managed by a highly experienced development managers who have a proven track record in developing within the LLEP area at MIRA one of the UK's leading Enterprise Zones. The entire team structure has been created for the masterplan delivery with the necessary skills and experience to manage both cost and construction risk. The construction contract is proposed on fixed price basis to a specified design to safeguard against cost overruns. Therefore, the programme will require certainty of development finance at an early stage to no cost or time increases.

The only other main financial risk is the impacts associated with Covid-19. To combat this, the finances of the Zoo are being carefully managed and more ambitious plans have been halted. A suitable allowance has been made for contingency and risk, as

well as for design teams, client requirements, due diligence works. The zoo has been extremely proactive in engaging with political and community stakeholders to account for their views. Therefore, this risk has been appropriately mitigated to help prevent any cost increases. In the risk register, the Covid-19 risk is still considered high due to its nature; however, the financial risk of this has been mitigated accordingly.

Cost overruns

Twycross Zoo commits to dealing with any cost overruns to the project that are above those stated in this application form. This commitment has been set out in their co-funding letter in **Appendix F**.

Cost-overruns are not expected however, due to the project management and commercial structures in place. Risk will be transferred to the primary contractor where possible.

(Words: 485)

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)

Overview

As part of the project development, Twycross Zoo have appraised various procurement strategies available to deliver the proposed NSCC works

Having appraised the various strategies available, and the pros and cons of each, the most appropriate strategy is a two stage Design & Build strategy.

Option selection process

The parties in the construction industry can be engaged and brought together to provide services in a variety of quite different ways. Differing procurement methods are ideal for some aspects of typical client demand, whilst being less appropriate for others. No single procurement strategy can be suitable for every case; therefore, to determine the correct procurement path, it is necessary to consider the priority objectives for the project and assess them against the characteristics of each procurement path.

The key options in meeting the project's objectives are:

- Traditional procurement.
- Design & Build (single-stage and two-stage).
- Management Contracting.
- Construction Management.
- Design, Manage & Construct with GMP.
- Partnering.

These options were considered within a quantitative appraisal framework. The framework was based upon the key objectives of the project. The key objectives for the project were:

- Programme certainty
- Risk transfer
- Early contractor involvement
- Cost certainty
- Control over works, design and processes
- Health and safety within construction

As is made clear in the following table, a D&B approach can be demonstrated to be preferable of the options available, with a two-stage rather than single-stage process being the more appropriate tender strategy.

This process is set out within the Delivery Plan and the Programme. The tender and appointment of the Stage 1 of the D&B will take place in early to mid-2022 as part of the Spatial Coordination and Planning milestones. The tender and appointment of Stage 2 of the D&B process will take place in mid to late-2022 as part of the Technical Design milestones.

This process has been used by Twycross Zoo's previous significant investment, totalling £10 million over recent years. It has been expertly managed and procured by their project team. It is appropriate for a bid of the scale and nature submitted as it allows risk to be transferred to the contractors, fixed prices to be used to prevent cost overruns and clear deadlines and milestones to be set.

Process

A full property development delivery team has been put in place to carry out development and construction of the future phases of the masterplan. This team comprises consultants for the key disciplines managed by highly experienced development managers. The development management team represent the Twycross Zoo interests as their clients, reporting to their executive board on a regular basis. This structure allows both involvement and informed decision-making by Twycross Zoo as client, with regular reporting protocols to control project delivery.

(Words: 448)

6.3 Management

See technical note Section 4 and Table 1 for further guidance

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

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

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

A full delivery plan, including clear milestones and the risk assessment, is provided in **Appendix H Delivery Plan**.

Milestones and dependencies

The following programme is provided:

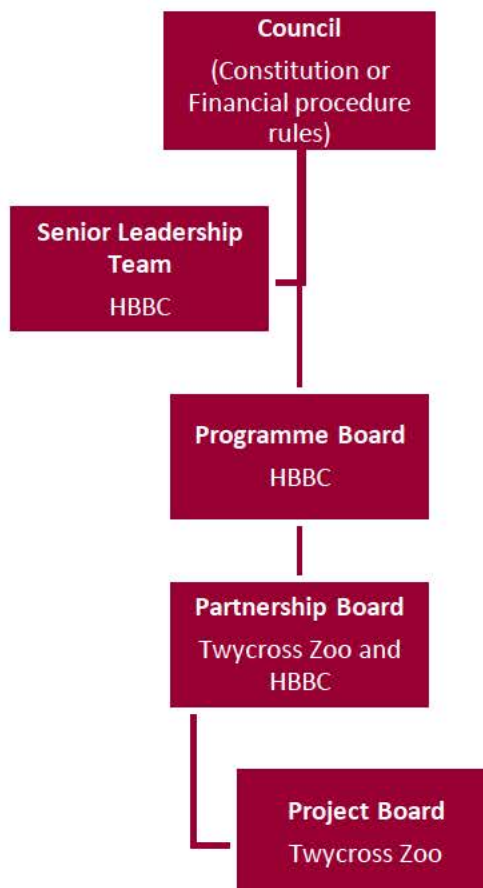
Outline programme - Activities	2021				2022												2023					2024												
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar		
RIBA Stage 1: Preparation and Briefing (Duration Aug-Sept 21)																																		
Appoint Key Design Team Consultants (PM, QS, Arch)																																		
Develop Client Brief																																		
Feasibility Studies																																		
RIBA Stage 2: Concept Design (Duration Oct-Dec 21)																																		
Appoint Full Design Team (PM, QS, Arc, Struct Eng, MEP, PD, Planning C)																																		
Develop Concept Design, Cost Plan and Outline Programme																																		
RIBA Stage 3: Spatial Coordination & Planning (Duration Jan-Jul 22)																																		
Develop stage 3 design, cost and programme information																																		
D&B - Develop and Issues Stage 1 Tender																																		
Tender Return and Adjudication																																		
Appoint Contractor - PCSA																																		
Submit Planning Application/Obtain Consent																																		
RIBA Stage 4: Technical Design (Stage 2 D&B Offer) (Duration Jul-Oct 22)																																		
Develop Stage 2 Tender Design and Tender Offer																																		
Review Contractor Proposals and Accept Tender Offer																																		
Tender Award/Appoint Contractor																																		
RIBA Stage 5: Manufacturing and Construction (Duration Nov 23-Jan 24)																																		
Mobilisation																																		
Construction Works																																		
RIBA Stage 6 - Handover (Duration Feb 24-Mar 24)																																		
TZ Operational Fit Out Works																																		
RIBA Stage 7 - Use (Duration Apr 24)																																		
Go Live /Operational																																		

Due to the established track record of operating and growing a major economic asset, we are confident that the NSCC will be delivered in line with timescales and main outputs. However, there are some key strategic dependencies:

- **Planning permission** – The overall 2030 masterplan has been accepted by the local planning authority. The NSCC is part of this overall masterplan. More detailed plans are required to support a specific planning application. The local planning authority have been very positive in its prospects including providing a quotation within **Appendix I**.
- **Confirmation of public funding** – the availability of public sector funding from the LUF is critical to the delivery of the NSCC. Without this funding, the project will not be able to come forward.
- **Partnerships** – The project's success is dependent upon established partnerships between Twycross Zoo and key educational assets. **MoUs have been agreed with multiple partner universities** to provide confidence to the plans.

Team and governance

HBBC will act as the funding body having been recipient of the LUF monies. The monies will be managed within the Council's existing financial controls. The proposed governance structure is proposed:



The roles and responsibilities are:

- **HBBC:** The full Council will sign off elements in accordance with the Council Constitution and financial procedure rules.

- **Programme Board:** Monitor progress of the project. It will sign off any project change and monitoring reports. The Council will use its existing Asset and Regeneration Officers Group as Programme Board.
- **Partnership Board:** Consisting of members from both the Zoo and HBBC. It will provide highlight reports to the Programme Board and exception reports plus any project change requests.
- **Project Group:** Responsible for the physical delivery of the project. This Group will be led by the Zoo's CEO, Dr Sharon Redrobe OBE.

This structure will ensure the required cross-cutting to deliver an innovative and market-leading facility, helping to ensure effective coordination and economies of scale. Twycross Zoo, and Dr Sharon Redrobe OBE in particular, has proven that the organisation can be a leading voice in conservation, science, and education.

Engagement and benefits realisation

A full property development delivery team is established for future phases of the masterplan.

Additionally, an engagement strategy has been produced, including the following stakeholders:

- MPs;
- Central government departments;
- Higher education/research;
- School education;
- UK Science Base;
- Tourism and leisure;
- Community and heritage;
- Environment and biodiversity; and
- Innovation.

The groups have been categorised into key stakeholders, affected stakeholders, and interested stakeholders based on their influence and interest. Twycross Zoo will manage key stakeholders closely, monitor monitoring affected stakeholders and update interested stakeholders.

(words: 447)

6.3b Has a delivery plan been appended to your bid?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
6.3c Can you demonstrate ability to begin delivery on the ground in 2021-22?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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*

Risk overview

The main risks to the project and their mitigation measures have been summarised in **Appendix F Risk Register**. The full process of the risk assessment is set out in **Appendix H Delivery Plan**. The key objective of the Risk Register is to apply pre-assessed and documented risk management procedures to specific, identified hazards. The information provided with the Risk Register, including the allowances made for risk, provide a much greater understanding of basic costs and the cost of risk transfer.

Roles and responsibilities

Twycross Zoo's project team will be responsible for installing the appropriate and effective mitigations to minimise each risk.

The Risk Manager (Project Lead – Dr Sharon Redrobe OBE) will oversee this process, assigning Risk Owners to each of the identified risks. The Risk Manager will ensure that all Project team members are aware of the requirements and responsibilities of the Risk Management process and to this end will make available Risk Management Procedures, which will provide detailed instructions on how to perform each step.

Level of risks and uncertainties

Risks have been assessed using judgements in relation to the probability and impact of each risk item. A score of 0 (very low) to 5 (very high) has been given in each case to probability and impact respectively, with the risk score being the product of probability and risk.

The key risks for the project include the following:

- Planning permission – The specific plans for the NSCC require planning permission from the local planning authority before construction can commence.
 - Mitigation: Early engagement with local planning authority already taken place and will continue. They have provided a quote indicating they are supportive of the plans.
 -
- Procurement – Suitable design consultants and contractors need to be selected through a robust tender process.
 - Mitigation: Timely selection of development partners/contractors in line with programme. Programme allows sufficient timings and contingencies for procurement.
- Market demand – the operation of the facility requires partnerships to be made between Twycross University and educational facilities such as universities, schools, and researchers.
 - Mitigation: Thorough engagement already taken place with prospective partners. MoUs have been signed with multiple universities and the

scope of works have been adapted to fit the needs of partners after workshops.

- Covid-19 – Wider Covid-19 economic impact interrupts tourism market demand as well as confidence of prospective partners.
 - Mitigation: Visitors have returned to the attraction safely and operations have engaged with political and community stakeholders to account for their views. The finances of the Zoo are being carefully managed and more ambitious plans have been halted.
- Funding – the project is dependent on the Levelling Up Fund investment, as Twycross Zoo’s finances have been significantly constrained by Covid-19 implications.
 - Mitigation: Demonstration of co-funding commitment. Develop plans where possible whilst awaiting government decision.

These mitigations will be implemented by the Risk Owner as soon as circumstances allow, with oversight from the Risk Manager. All risks are deemed to be suitably mitigated.

(words: 488)

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

Twycross Zoo attracts over 650,000 visitors per year within its 100-acre site. The organization and expertise to operate a zoo of this scale is enormous. Daily operations include movement of great apes, animal welfare, and the safety of visitors.

The last 6 years has seen significant progress in the 2030 master plan including £10m of investments in new projects. The ambition is to propel the zoo to be at the heart of leading-edge conservation. The NSCC is the focal point of this vision.

This growth has been expertly overseen by Dr Sharon Redrobe OBE (CEO). Since appointment as CEO in 2013, Sharon has invigorated this traditional business by positioning it as a conservation charity that runs a zoo and launching an ambitious 20-year £55m development plan. These plans have transformed Twycross Zoo from a loss-making charity into one investing over £10m in five years in new science-based animal habitats. However, the financial implications of Covid-19 have meant ambitious development plans for the NSCC cannot be delivered without public funding. Sharon’s track record clearly demonstrates the capability, experience, and ability to deliver this scheme however, funding is required.

Additionally, HBBC has a track record of delivering major projects in partnership with organisations:

- Working with Places for People to deliver the new Hinckley Leisure Centre in 2016, a £15m new state-of-the-art sports and leisure building;
- A major £80m retail and leisure scheme developed by Tin Hat partnership at the Crescent in the centre of Hinckley, delivered in 2015.

(Words: 246)

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)

In summary these procedures shall be that:

Hinckley and Bosworth Borough Council Keep a separate set of accounting records within the general ledger coding structure for the grant income and expenses incurred. This will be reviewed by the Head of Finance as part of the budgetary control process. These transaction will form part of the audited transactions of the Council by our external auditors, and will be available for review by our internal auditors

Grant release to Twycross will based on:-

- .1. Claims submitted to the council on a periodic basis, but quarterly as a minimum, by Twycross.
- .2. Claim will require evidence of payments made invoices, order numbers, any output based information required, which will be reviewed by an accountant with budget responsibility for these codes within HBBC's finance team.
- .3. HBBC will check the claim make sure it agrees to any eligibly criteria.
- .4. Once HBBC are satisfied the funds will be authorised for release in line with our procedure rules.
- .5. If no issues with the claim, payment will be made within 10 working days of receipt of grant claim.

(Words: 183)

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

Bid level M&E objectives and research questions

Benefits management, monitoring and evaluation will be carried out by the Zoo in collaboration with the Council to understand the success of interventions, whether they are achieving desired outcomes, and how and why this is the case. The key research questions which will inform the M&E approach will include:

- Whether the rationale for intervention continued to apply during the implementation phase;
- Whether assumptions underpinning the Theory of Change and leading to benefits held in practice;
- The extent to which outputs and outcomes can be attributed to LUF interventions; and
- The impact of the LUF programme and whether it provides value for money.

Outline of bid level M&E approach

M&E will be undertaken in line with guidance issued by MHCLG. The approach will ensure that all those involved in delivering the LUF-funded projects will have a clear understanding of the benefits to be achieved and the mechanisms through which these benefits will arise. The approach will set out the expected timeline over which benefits will arise, identify how these benefits will contribute towards the achievement of the LUF objectives, and include a process for reviewing and updating benefits realisation plans if proposed interventions change.

Key stages include:

- **Agreement of key research questions**
- **Profiling and monitoring benefits** - a clear profile of benefits will be outlined for each project, including baseline position, financial spend targets, target delivery schedule, key milestones and target output forecasts. Specific KPIs will be identified to ensure targets are achieved within set delivery schedules. A benefit plan will be completed which includes a description of the realised benefits, the quantifiable, financial gain of the benefit, the metrics used to measure the scale of the benefit, the main beneficiaries of the project and the duration.
- **Realising benefits** – identified project staff will track the progress of benefit realisation, ensuring benefits remain relevant, deliverable and valid. Benefits will be agreed as being realised when the expected measurement of change has been achieved. It will be the responsibility of the project manager to ensure that the targets are achieved as planned.
- **Monitoring and review** - The approach will be proportionate to the resource invested in each intervention, making efficient use of existing capacity, data and expertise. This will inform decisions about the shape of the project and highlight areas where additional resource / capacity is required, enabling remedial action to be taken if interventions are not delivering the desired outputs. Data collected will feed into the evaluation.

- **Evaluation** – the evaluation will consider how the programme has worked from a delivery perspective and through the experience of stakeholders.

Overview of key metrics

The table below sets out the key performance indicators that have been identified to track progress of the NSCC LUF programme. It includes sources for monitoring each objective, the frequency of collection and responsibility for this. Regular monitoring updates, in terms of milestones and achievement of outputs, will be provided monthly to the Programme Manager and Project Board to inform an ongoing review of the project's delivery.

Monitoring framework - indicators			
Objectives	Indicators and Source	Frequency	Responsibility
Sustaining Twycross Zoo as an important education and tourism asset and focal point in the area	Visitor numbers	Daily visitor data collection	Twycross Zoo
	Average length of stay	Quarterly monitoring reports	
	Per capita spend		
	Repeat visits	Annual consumer surveys	
	Catchment of visitors		
	Positive visitor surveys		
	No. of school visitors		
New schools supported			
Strengthening the cultural and leisure offer	Visitor numbers	Quarterly monitoring reports	Twycross Zoo
	Positive consumer surveys	Annual survey	
	Positive business surveys		
	New cultural businesses supported		
	No. of events		
	Variety of events		
	Reputation of events held		
Improving pathways to research and educational facilities	Course starts and associated qualifications	Quarterly monitoring reports	Twycross Zoo Partner universities
	Course completions	Partner universities data – term/semester based	
	Student numbers		
	No. of school visits		
Provision of world-leading research and conservation facilities	Course starts and qualifications	Quarterly monitoring reports	Twycross Zoo Partner universities
	Course completions	Partner universities data – term/semester based	
	Student numbers		
	Variety of courses		
	No. of research publications		
	No. of national conferences		
	No. of international conferences		
Catchment of students			

The following indicators will also be monitored on a six-monthly basis:

- Project spend (total, co-funding, co-funding committed)
- Project delivery (number of projects started on time, completed, completed on budget, completed on time)
- Delivery capacity (staff and budget invested)
- Outcomes (jobs created and safeguarded)

Resourcing and governance arrangements

Funding has been allocated for the following M&E activities:

- Time to gather, verify and report the required monitoring information to MHCLG
- Purchase of data / commissioning of surveys and data gathering by market research or other specialist companies (e.g. on vacancies, rental levels etc)
- Independent set-piece evaluation studies at interim and impact evaluation stages, ensuring an objective and robust assessment of progress and enabling all stakeholders to provide their views.

Appointed individuals within Twycross Zoo and HBBC will have overall responsibility for oversight and reporting on performance to MHCLG. Day to day responsibility for monitoring and performance management will be allocated amongst the project management team, with the team also having responsibility for reporting on finance and spend and wider outcomes achieved. Appropriate CRM systems will be established prior to project implementation where necessary.

Regular feedback will be given to partners and stakeholders on the progress and performance of the project. This may include focus groups or meetings to discuss any issues identified during the monitoring of the project and arising from the interim and impact evaluations.

(Words: 726)

PART 7 DECLARATIONS

7.1 Senior Responsible Owner Declaration

As Senior Responsible Owner for National Science Conservation Centre at Twycross Zoo project I hereby submit this request for approval to UKG on behalf of Hinckley and Bosworth Borough Council and confirm that I have the necessary authority to do so.

I confirm that Hinckley and Bosworth Borough 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: Matt Bowers

Signed:



7.2 Chief Finance Officer Declaration

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

- 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: Ashley Wilson

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	
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)	
A3. Geographical area: Please provide a short description of the area covered by the bid (<u>in no more than 100 words</u>)	
A4. OS Grid Reference	
A5. Postcode	
A6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	
A7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
A8. Project theme Please select the project theme	<input type="checkbox"/> Transport investment <input type="checkbox"/> Regeneration and town centre investment <input type="checkbox"/> Cultural investment
A9. Value of capital grant being requested for this project (£):	
A10. Value of match funding and sources (£):	
A11. 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 (Limit 250 word)</p>	
<p>A12. It will be generally expected that an overall Benefit Cost Ratio and Value for Money Assessment will be reported in applications. If this is not possible, then the application should include a clear explanation of why not.</p>	
<p>A13. Where available, please provide the BCR for this project</p>	
<p>A14. Does your proposal deliver strong non-monetised benefits? Please set out what these are and evidence them.</p>	
<p>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.</p>	
<p>A16. 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>A17. Does this project includes plans for some LUF expenditure in 2021-22?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>A18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

A19. Please provide evidence	
A20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input type="checkbox"/> Yes <input type="checkbox"/> No
A21. Please provide evidence	
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.	

DRAFT

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

Project 2	
B1. Project Name	
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)	
B3. Geographical area: Please provide a short description of the area covered by the bid (<u>in no more than 100 words</u>)	
B4. OS Grid Reference	
B5. Postcode	
B6. For Counties, Greater London Authority and Combined Authorities/Mayoral Combined Authorities, please provide details of the district council or unitary authority where the bid is located (or predominantly located)	
B7. Please append a map showing the location (and where applicable the route) of the proposed scheme, existing transport infrastructure and other points of particular interest to the bid e.g. development sites, areas of existing employment, constraints etc.	
B8. Project theme Please select the project theme	<input type="checkbox"/> 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 (£):	
B10. Value of match funding and sources (£):	
B11. Value for Money	

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

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.

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

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

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.

B16. 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

B17. Does this project includes plans for some LUF expenditure in 2021-22?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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B18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?	<input type="checkbox"/> Yes <input type="checkbox"/> No
--	---

B19. Please provide evidence	
B20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input type="checkbox"/> Yes <input type="checkbox"/> No
B21. Please provide evidence	
Statutory Powers and Consents	
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.	
B23. Please list separately any <u>outstanding</u> statutory powers / consents etc, including the timetable for obtaining them.	

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

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

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

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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.

--

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

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

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.

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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?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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C18. Could this project be delivered as a standalone project or do it require to be part of the overall bid?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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C19. Please provide evidence	
C20. Can you demonstrate ability to deliver on the ground in 2021-22.	<input type="checkbox"/> Yes <input type="checkbox"/> No
C21. Please provide evidence	
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.	

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?		Appendix B Luke Evans MP Support Appendix C Letters of Support
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?		N/A
Part 4.3 The Case for Investment		
For Transport Bids: Have you provided an Option Assessment Report (OAR)		N/A
Part 6.1 Financial		
Have you appended copies of confirmed match funding?		Appendix F Co-Funding Commitment Dr Sharon Redrobe OBE
The UKG may accept the provision of land from third parties as part of the local contribution towards scheme costs. Please provide evidence in the form of a letter from an independent valuer to verify the true market value of the land. Have you appended a letter to support this case?		N/A
Part 6.3 Management		
Has a delivery plan been appended to your bid?		Appendix H Delivery Plan
Has a letter relating to land acquisition been appended?		N/A
Have you attached a copy of your Risk Register?		Appendix G 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.		N/A

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.		