

LOCAL AUTHORITY MAJOR SCHEMES BEST AND FINAL FUNDING BID SEPTEMBER 2011	
Scheme Name	Weston Package
Local Authority	North Somerset Council

SCHEME COST SUMMARY (£m)		
	Scheme As Previously Configured (from section 1.4)	Revised Scheme (from section 4.4)
LA contribution	2.715	3.249
Third Party Contribution	1.1	1.350
DfT Funding Contribution	11.75	10.395
Total	15.565	14.994

CONTACT DETAILS FOR FURTHER ENQUIRIES	
Lead Contact: Position: Tel: E-mail:	Colin Medus Head of Highways and Transport 01934 426498 Colin.Medus@n-somerset.gov.uk
Alternative Contact: Position: Tel: E-mail:	Alex Fear Engineering & Design Manager 01934 426458 Alex.Fear@n-somerset.gov.uk

NOTE: Bids should be received by the Department by Noon on 9th September 2011.

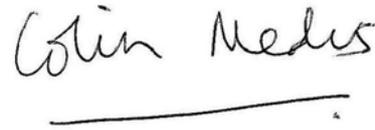
SENIOR RESPONSIBLE OWNER DECLARATION

As Senior Responsible Owner for [scheme name] I hereby submit this Best and Final Funding Bid to DfT on behalf of [*insert authority name*] and confirm that I have the necessary authority to do so.

Name: Colin Medus

Signed:

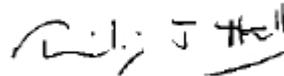
Position: Head of Highways and Transport

**SECTION 151 OFFICER DECLARATION**

As Section 151 Officer for [name of authority] I declare that the scheme cost estimates quoted in this bid are accurate to the best of my knowledge and that [*insert authority name*] has the intention and the means to deliver this scheme on the basis of its proposed funding contribution at section 4.3 (a) above, as well as meeting any ongoing revenue requirements on the understanding that no further increase in DfT funding will be considered beyond the maximum contribution requested at 4.3 (c) (including if third party contributions should no longer be available).

Name: Phil Hall

Signed:



Please Note: The promoting authority should ensure that a copy of this BAFB form and all supporting information is available on its website by 5pm on 12 September 2011.

Please detail the appropriate location where these documents can be located. The Department may provide a link to these pages from its own website.

www.travelplus.org.uk

SECTION 1: THE SCHEME AS PREVIOUSLY CONFIGURED**i.e. BEFORE 10 JUNE 2010**

This section should EITHER describe the scheme as approved at Programme Entry OR as submitted in a business case bid for Programme Entry OR on the latest design on which the last QMR submitted to the Department was based.

Note: this information should be consistent with what was included in previous EoI with any differences explained.

Date of Programme Entry or PE Bid or last QMR Submission (<i>where applicable</i>)	As approved at Programme Entry March 2010
Estimated total scheme cost (<i>inclusive of eligible preparatory costs</i>) Whilst the letter awarding Programme Entry stated £15.992m, prior to that in Sept 2009 the total scheme cost was reduced to £15.206m.	£15.206m
DfT contribution In the letter awarding Programme Entry the intended departmental contribution was £12.368m as per the March 2009 PE bid. However following the process of DfT questions in September 2009 the DfT contribution was revised to £11.469m.	£11.469m
Local Authority Contribution (<i>excluding the costs of any Part 1 Claims that you may have included at this time</i>)	£2.637m
Third party contribution	£1.1m

1.1 Brief description of the scheme as previously configured *This should clearly state the scope of the scheme and describe all of its key components.*

The Weston Package Phase1 MSBC was submitted to the Department in March 2009. This included both a Preferred Scheme and a Low Cost Option. The Preferred Scheme included 7 components, two of which involved specific highway infrastructure needed to unlock development areas at Weston Airfield and Locking Parklands. Due to the depressed development market during 2009, North Somerset Council agreed with the Department to decouple Weston Package Phase 1 (WP1). This resulted in Programme Entry being awarded in March 2010 for the decoupled Low Cost Option.

The Low Cost Option comprised a series of improvements to the transport infrastructure of Weston, which would benefit a wide range of users and, of crucial importance, support the **employment-led regeneration of the town**. The key components of the package are as follows:

SE1 M5 Junction 21 – increasing capacity for traffic heading into Weston;

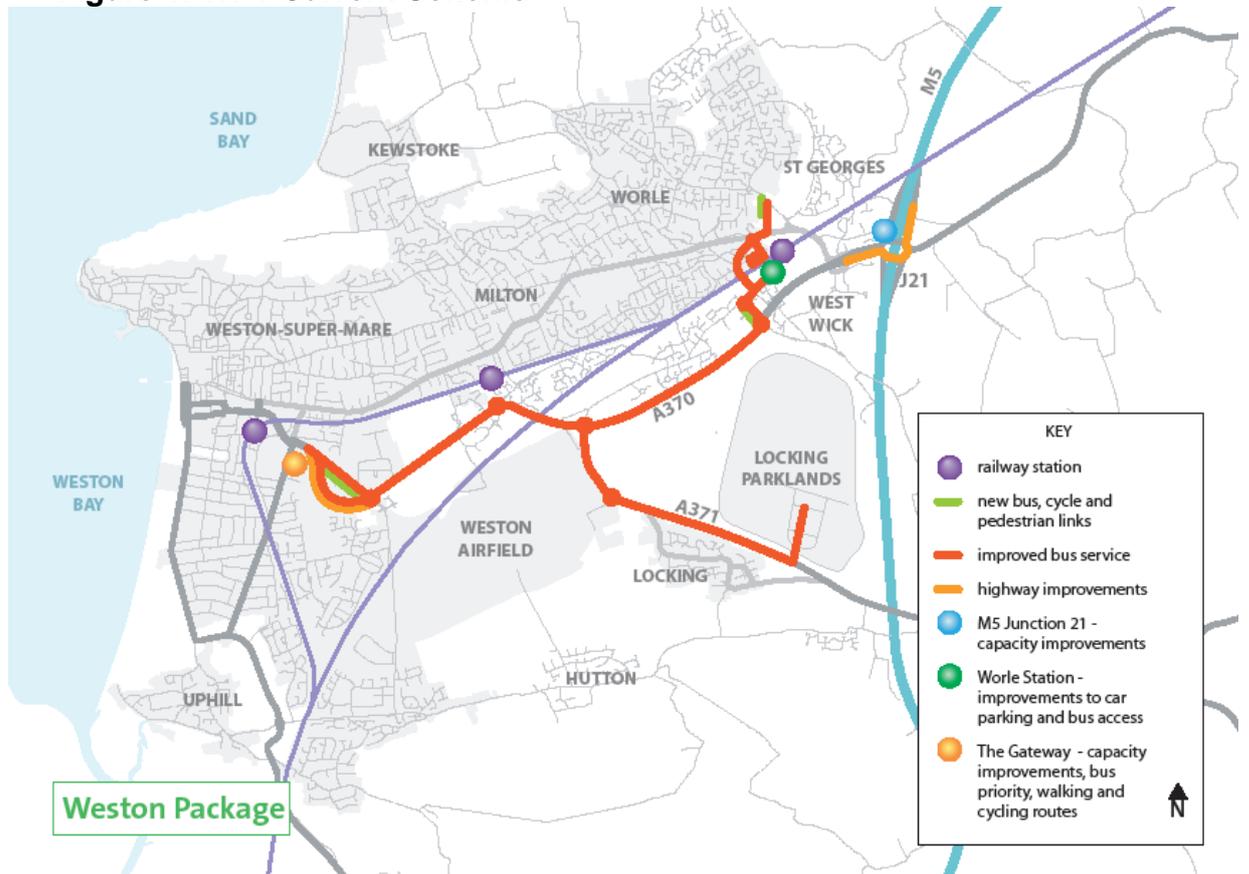
SE2 Queens Way – new bus only link road to access Worle railway station;

SE3 Elmham Way – bus priority measures linking regeneration areas to the town and rail network;

SE4 Weston Gateway – improving capacity through road widening and new walking and cycling routes together with bus priority measures;

SE5 Worle Station – new bus interchange including a new car park and pedestrian & cycle facilities.

Figure 1: WP1 Current Scheme



SE1 - M5 Junction 21 Capacity Enhancements

Congestion at M5 Junction 21 (A370) is a significant barrier to movement, both to and from Weston and along the M5 itself. This congestion constrains both existing and new business in Weston. There is particular concern regarding the potential for tailbacks onto the M5.

WP1 would provide targeted capacity improvements, namely: widening the southbound off-slip, the A370 (east) approach and A370 (west) exit from 2 to 3 lanes; marking out 3 lanes on the gyratory; and new traffic signals on the M5 off-slips and the A370 (east) approaches.

The scheme benefits include; queue reduction on the M5 off-slips (especially in the PM peak period); queue reduction back onto the M5 itself benefiting strategic traffic movement on a regional level and supporting employment-led growth in Weston by addressing congestion issues.

SE2 – Queens Way Bus Link

The 80m bus-only link at Queen's Way would assist buses in accessing Worle Station. This new link will enable buses to avoid the congested junction at Queens Way/B3440 that currently deters operators from bringing key bus services any closer to the station than the existing terminus 600m away on Queensway.

SE3 – Elmham Way Bus Priority

Bus priority and traffic management on Elmham Way will assist bus access to the south of Worle Station linking it with regeneration areas. The road suffers from queues from the A370 which inhibit bus movement. The provision of improved traffic signals with crossing points will also benefit pedestrians and cyclists.

SE4 - Weston Gateway Improvements

The Weston Gateway strides the A370 between the town centre and the regeneration area. The A370 is split into two one-way carriageways with two lanes in each direction providing the main traffic route to and from the town centre and access points to adjacent retail units and businesses.

Westbound dualing with associated signal crossings and junctions would accommodate through traffic and parallel cyclist routes. The eastbound highway would be remodelled as a local access route and a route for buses and cyclists. Improvements to the western end roundabout include a town-bound bus lane.

SE5 - Worle Station

Worle Station is served by both local and inter-city rail services. Demand for the current car park exceeds supply. No bus interchange facilities at Worle Station restrict modal shift opportunities.

A new 320 space car park with a bus interchange; drop-off and cycle facilities together with improvements to the north-side car park are proposed.

1.2 What are/were the primary objectives of the scheme?

Please limit this to the primary objectives (ideally no more than 3) the problems to which this scheme is the solution. If the primary objectives have changed please explain why. Do not include secondary objectives i.e. things to which the scheme will contribute.

The aim of WP1 is to enable the **sustainable development** of Weston-super-Mare. The primary objectives of the scheme are to:

- Rebalance the local economy by supporting **employment led growth**, increasing self containment and reducing out commuting;
- **Reduce town centre congestion** by enabling more sustainable travel; and
- **Enhance network resilience** by improving the interface between the local road network and strategic road network.

Weston has seen significant residential growth in recent decades, but a reduction in its employment base has led to high levels of out-commuting. One of the barriers to job creation in Weston is the poor perception of the town in the eyes of business, which includes transport problems. Conversely, the attractiveness of Weston as a place to live remains, evidenced by a strong pre-recession market for homes.

The main highway routes serving Weston are the M5 and the A370 via J21. Weekday traffic conditions are characterised by peak period congestion at M5 J21, and at the main junctions along the A370 between J21 and the town centre. In the PM peak, returning inbound traffic queues on the M5 off-slips, frequently blocking back onto the M5 itself.

The traffic conditions at J21 and access to the town are the real transport issues facing road users and businesses in Weston caused in the main by the imbalance between jobs and houses in the town; which has generated high levels of out commuting.

North Somerset Council and the business sector, have been seeking to regenerate and rebalance the economy of Weston to reduce its reliance on tourism and redress the loss of employment opportunities. WP1 is an essential prerequisite in this aim whilst also delivering LDF Core Strategy objectives.

1.3 Please describe the process by which this scheme came to be the preferred option for meeting those objectives including reasons why alternatives were not progressed.

This may simply be an extract from what has already been described in previous Major Scheme Business Cases. However please take the opportunity to expand on that previous material as necessary.

Weston Vision

WP1 can be traced back through a programme of studies and analyses that were collectively referred to as the 'Weston Vision'. The first of these, '**A New Vision for Weston**', was published in 2002 which set out the aims of North Somerset Council and its partners to regenerate and rebalance the economy of Weston to reduce its reliance on tourism and redress the loss of employment opportunities. The Vision recognised that the town had real strengths, but also had problems, one of which was transport.

The economic development strategy that supported the vision was based around a focus on financial and business services, leisure and recreation, higher education, retail, high-tech and research and development sectors. Transport enhancements focused on improving the rail transport infrastructure linking Weston with Bristol and Weston's strategic road network, including the M5 J21.

Weston Area Development Framework (ADF)

The Vision was taken forward through the ADF of 2005, which set out a strategy for the "strategic re-positioning of the town as a high profile centre of growth in the region supported by a strong employment base and exemplary standards in design and sustainability". Consultation was a key and integral part of the ADF process. The ADF contained a 'movement framework' that identified key areas where improvements to transport would be required to meet the strategic goals.

Evaluation

The transportation improvement projects from the ADF and other work streams were robustly evaluated against the following questions;

- Does it meet the objectives of WP1?
- Does it meet DfT criteria for major scheme funding?
- Is it feasible and/or deliverable within the timescales for the funding allocation?
- Is it affordable?

The results are shown in Table 2.2 of the strategic case as part of the Programme Entry bid submitted in April 2009. The short-listed schemes that were identified for inclusion in the package approach preferred scheme were as follows:

- Improvements to Junction 21;
- Cross Airfield Link [CAL];
- New link between the CAL and the Gateway, crossing the mainline railway (the Airfield Bridge Link or ABL).
- A370 Winterstoke and Drove Road roundabouts plus highway network between these junctions, known as the Gateway;
- Worle station to include bus interchange with extended bus services, new parking, better passenger facilities and extended platforms;
- A370/Elmham Way West Wick roundabout;
- Showcase bus route treatments to be incorporated into WP1 scheme components; and
- Bus based Park and Ride to the town centre and seafront.

Elements not progressed

On a visit to Weston in late 2008, discussions were opened with the Department to determine whether the CAL could be included in the WP1 bid. In the light of this and the abortive RIF, further work was undertaken to develop a phased WP1 bid. The CAL and associated ABL would come forward as a later second phase of WP1, with the other WP1 scheme components coming forward in the funding window of 2011-2015. This approach was consistent with the supplementary guidance on 'de-coupling' issued by the Department in February 2009.

In developing the scheme consideration was given to including bus priority measures and High Occupancy Vehicle [HOV] lanes at J21. At that time the GBBN major transport scheme was to provide a set-back westbound bus lane on the A370 east approach to J21. An eastbound HOV lane on the A370 was rejected because it would require highway widening from 2 to 3 lanes, the cost of which was considered prohibitive. HOV lanes on the off-slips were rejected on safety grounds due to the concerns over lane changing movements on the roundabout and A370 exits.

The proposed bus based Park and Ride for the town centre and seafront was assessed in more detail to determine whether it would be viable. Potential demand was

extracted from the G-NS traffic model and input to a spreadsheet mode split model. This analysis concluded that Park and Ride would require a significant annual operating subsidy and on this basis was dropped from the WP1 bid.

More detail is available in section 2 of the Programme Entry bid, the Strategic Case, setting out how each element was formed and showing further aspects that were considered but not taken forward.

1.4 What was the last total estimated cost of the scheme as previously configured including where changed since the award of Programme Entry?

Please provide the latest cost of the scheme with a summary and where, appropriate, an explanation of the key changes from the previous cost breakdown. Please use this section to identify any cost savings that you have already made since the award of Programme Entry. Figures should be outturn costs. Please adjust to exclude the costs of any Part 1 Claims that you may have included at this time.

The table below are costs produced in autumn 2010. These costs apply after the award of Programme Entry in March 2010 and reflect the delay impacts arising from changes to the MSB process. The calculations were prior to the value engineering work and commencement of detailed design. Estimates therefore still based on the outline designs prepared for Programme Entry. Costs for Part 1 claims were not included. These figures incorporate inflation assumptions revised from 6% to 2.79% to reflect the changing national economy.

£m	Pre 2011/12	2011/12	2012/13	2013/14	2014/15	2015/16	Total	%
LA contribution		0.875	1.840				2.715	17.4
Third Party contribution			0.550	0.550			1.1	7.1
DfT funding requested			2.023	5.331	2.892	1.504	11.75	75.5
TOTAL		0.875	4.413	5.881	2.892	1.504	15.565	

1.5 Please describe any developments (such as housing) linked with the scheme as described above and explain any changes impacting on these developments (eg policy changes such as housing allocations, changes to redevelopment plans)?

This should explain any links that the planned scheme had to major developments and provide details of changes to these plans such as through changes in policy relating to housing, changes to developer plans etc

The West of England Local Enterprise Partnership (LEP) ambition is to deliver 95,000 new jobs by 2030. Key to this will be the realisation of the challenge of delivering 72,000 new homes and 74,000 new jobs by 2026, as set out in the authorities' Core Strategies.

Since the Programme Entry bid in March 2009 there have been some changes to the proposed housing numbers in emerging policy for the regeneration areas in Weston. These numbers have been informed by viability assessments and have been translated into master planning frameworks that include reference to the WP1 interventions. WP1 remains an essential prerequisite to rebalancing the town's economy and delivering the development aspirations for the town.

Residential

North Somerset Council as part of its LDF Core Strategy Publication Version, is now proposing:

- 6,000 dwellings within the regeneration area to the south east of Weston;
- 3,300 dwellings within the existing built up area.

Nearly 10,000 dwellings. This compares to earlier estimates of around 12,000 dwellings as set out in the April 2009 Programme Entry Bid.

Approved development;

- 900 dwellings within the regeneration area at Winterstoke Village;
- 100 dwellings within the regeneration area at Parklands Village.

This clearly demonstrates growing confidence in the housing market with works at Parklands Village already underway.

Employment

North Somerset Council Core Strategy (publication version January 2011) sets out a employment aspirations, namely;

- 10,000 new jobs in Weston. B use classes at the proposed Urban Villages.
- Winterstoke Village - linked with 900 dwellings at Winterstoke Village, outline consent granted for a business park and industrial quarter. Development comprises 17ha B1 use (office) and 12.5ha B2 and B8 use (industrial).

Bus services

Provision for extended bus services into the regeneration areas during the initial part of the development and for new services when the CAL is complete.

SECTION 2: REVISED SCHEME PROPOSAL

This section should describe the changes you are proposing to make for the purposes of your Best and Final Funding Bid.

2.1 Are you proposing any changes of scope from the scheme as described in Section 1? If yes, please describe in detail the changes you are proposing.

Please also attach explanatory maps, diagrams etc. as appropriate.

Whilst maintaining the primary objectives of **employment led growth, reducing town centre congestion and enhancing network resilience**. No changes of scope are proposed beyond the move to Low Cost Option described in section 2.5.

The move from the Preferred Scheme to the Low Cost Option was significant, reducing the total scheme cost down from £58.924m to £15.992m before subsequent work to reduce costs as described in section 2.3 below.

2.2 What, if any, additional changes of scope have you ruled out for the purposes of your Best and Final Funding Bid? Please give reasons.

Beyond move to low cost option there is limited scope for further changes without affecting the performance of the scheme in terms of achieving its key objectives of;

- **Employment led growth**
- **Reducing town centre congestion**
- **Enhancing network resilience**

Further de-scoping of the package is likely to undermine how each component relates to the others and the overall benefits achieved would be diluted.

2.3 Whether or not you are proposing a change of scope, please identify any savings that have been made to the total cost of the scheme, for example through value engineering.

Please provide details with a summary and explanation of the further savings beyond those already identified at 2.1 above or, if no scope changes are proposed, with reference to the cost breakdown provided in the latest cost estimate at 1.4 above.

Through decoupling the scheme now proposed is already the low cost version. At the EOI in January 2011, however, we indicated that we would try to achieve a saving of £0.4m compared with the outturn forecasts for the modified construction programme. We have been working to deliver that reduction through detailed design and value engineering. We are now able to not only meet the reduction of £0.4m but to go further than we anticipated and have provided a reduction of **£0.571m**.

This achievement is the result of robust option and value engineering workshops and appraisals to ensure that whilst the primary objectives are maintained this is done so at the best value. The detailed design work has progressed well enabling more robust cost estimates that are supported by an independent audit. This has enabled a number of risks to be moved from the risk register and the values of others to be reduced.

The table below indicates for each element the key items of work undertaken towards this overall cost reduction;

Scheme Element	Summary
SE 1 – M5 J21	<ul style="list-style-type: none"> • This is the element where we have seen the most cost pressure as design work progressed. We have managed this pressure by developing an option to move widening previously proposed on the outside perimeter of the roundabout to the inside. The Highways Agency confirmed that dedication of land is acceptable to permit internal alignment lane widening. This will allow the widening to be supported by earthworks as opposed to more costly retaining structures.
SE2 - Queensway	<ul style="list-style-type: none"> • During the detailed design for this element some additional costs were identified that were not included at the outline design stage. Through reduced changes on the main carriageway we have been able to keep this element cost neutral.
SE3 – Elmham Way	<ul style="list-style-type: none"> • Horizontal design amendments have enabled third party land requirements to be removed from the scheme and minimised utility diversions. • Through specific traffic modelling, removal of signals on the West Wick roundabout and reducing the length of the bus lane between Summer Lane and Bransby Way the element viability and output requirements were maintained but costs have been reduced.
SE4 – Weston Gateway	<p>This element has provided the most cost reductions.</p> <ul style="list-style-type: none"> • Horizontal design amendments have enabled third party land requirements to be removed from the scheme and enabled the position of Drove roundabout to be maintained at its current location whilst still achieving the required level of junction capacity. • Minimising excavation and proposing to re-use materials for other elements has resulted in cost savings • During the detailed design additional costs were identified in connection with catering for vulnerable users such as child pedestrians and cyclists. These included specific measures to assist children from the nearby school crossing Marchfields Way.
SE5 – Worle Station	<ul style="list-style-type: none"> • Opportunities for cost savings were very difficult given the Environment Agency requirements for flood management and the nature of the works proposed. However re-use of excavated spoil from other elements has enabled cost savings to be realised.

In addition, the **Strategic Business Case** overview sets out a range of joint initiatives to reduce scheme cost across all five major schemes in the programme including re-profiling of DfT spend to reduce inflationary pressures and balance

planned spend across programme; an integrated procurement strategy for the West of England schemes, which includes the establishment of a Programme Delivery Board to co-ordinate procurement activities; co-ordination of work programmes across the major scheme programme to minimise disruption during construction, optimise service diversion works and maximise the sustainable disposal or re-use of excavated materials; and a targeted re-evaluation of the strategic risk to eliminate any overlap with scheme-specific allowance.

2.4 Please provide separate details of any further changes you are proposing to the scheme from that submitted in January 2011.

No significant further changes to the scheme from that submitted in January 2011 are proposed. However Section 2.3 outlines some of the minor changes such as designing out land and alignment changes to reduce costs.

2.5 What is your latest assessment of the cost, feasibility and value for money of any alternatives to the proposed scheme?

This should include any previous options subsequently discarded and / or those proposed by third parties. Please explain why this / these options have not been progressed. Please detail any elements that have been included in your proposed scheme. Please make reference to any material differences with the preferred scheme in costs or benefits such as carbon impacts.

The Weston Package Phase1 MSBC was submitted to the department in March 2009. This included both a Preferred Scheme and a Low Cost Option. The Preferred Scheme included five key components, two of which involved specific highway infrastructure needed to unlock a major development area (urban extension) at Weston Airfield and Locking Parklands. These two components are the Cross Airfield Link and the Airfield Bridge Link. Due to the depressed development market during 2009, North Somerset Council agreed with the Department to de-couple Weston Package Phase 1 (WP1). Programme Entry was awarded in March 2010 on the decoupled Low Cost Option.

BCR for 'Preferred Scheme' as previously configured

The cost of the Preferred Scheme was estimated at £58.924m. The Preferred Scheme produced a Present Value of Benefits [PVB] for economic efficiency elements of £102.51m, giving a total PVB of £108.69m when combined with the accident and carbon benefits. Taken with PVC of £26.20m this produced a Net Present Value [NPV] of £82.49m and a BCR of 4.15 as at March 2009.

Park and ride

The proposed bus based Park and Ride for the town centre and seafront was assessed in more detail to determine whether it would be viable given a continuation of the council's current car park management regime. A report was produced (Weston-super-Mare Park and Ride Feasibility, Halcrow, March 2009).

Six potential sites for a Park and Ride were considered, of which one was selected for further investigation, starting with estimates of demand based on a Park and Ride service frequency of 15 minutes. Potential demand was extracted from the G-NS traffic model and input to a spreadsheet mode split model. This analysis concluded that Park and Ride would require a significant annual operating subsidy and was therefore dropped from the WP1 bid as not representing value for money.

SECTION 3: IMPACT OF CHANGES PROPOSED AND DELIVERY OF THE SCHEME

This section should describe the impact of the changes you are proposing in Section 2 above compared to the previously configured scheme as described in Section 1

3.1 What impact, if any, would the proposed changes have upon achievement of your primary objectives? *This should refer to the scheme as identified in section 2.1*

The value engineering modifications focus on reducing costs through design changes rather than scope changes. There is consequently no impact on achievement of primary objectives. The scheme now proposed (previously the Low Cost Option) still meets the primary objectives of **employment led growth, reducing town centre congestion and enhancing network resilience.**

3.2 Please provide a short description of your assessment of the value for money of the revised scheme including your estimate of the Benefit Cost Ratio. *This should cover both monetised and non-monetised costs and benefits and should briefly explain the reasons for significant changes since your most recent Business Case submitted to the Department. The full assessment, as set out in the Value For Money guidance should be provided as an Appendix. Valuation of any dependent development should be reported here, separately from the central value for money evidence and supporting evidence, and a full description of the approach taken should be included in the Appendix.*

The Value for Money assessment of the scheme has been updated for all monetised impacts for Economy, Social and Public Accounts impacts, based on the current DfT appraisal guidance. A stage zero assessment of Distributional impacts has been undertaken in accordance with current guidance, with further stages currently being progressed. Non-monetised impacts largely remain as per the previous submission, except where assessment of other impacts are required for the new AST form, structured in line with the Economy Case of the Five Case Model. Environmental impacts have not been updated as the potential change is not considered significant and the Value for Money Guidance for Development Pool Schemes recommends using existing evidence where possible.

Based on the VFM assessment for monetised impacts the updated BCR for the scheme is 6.16. The main non-monetised impacts of the scheme are a 'beneficial' impact on Air Quality and a 'moderate beneficial' impact on Journey Quality. The VfM Category for the scheme is 'Very High'.

Compared with the previously submitted business case, the BCR has improved as a result of several key factors:

- The journey time benefits from the scheme during the off-peak have been monetised.
- The improved public transport facilities generate rail benefits that were not previously included in the cost benefit calculation. These have now been monetised and included.
- The scheme delivers reliability benefits on the strategic road network and these have now been assessed in more detail
- The detailed design work has progressed significantly leading not only to

- Wider impact benefits have also now been monetised

The summary of the Cost-Benefit Analysis shows the following performance:

Indicator	BAFFB Scheme	MSBC Central Case
Consumer User Benefits	£19.476m	£16.211m
Business Users & Providers	£23.985m	£20.334m
Carbon	£0.824m	-£0.714m
Accident Benefits	£3.037m	£3.88m
Noise	£0.856m	
Wider Impacts Benefits	£2.410	
Wider Public Finances (indirect taxation)	-£1.823m	£3.020m
Additional Rail Benefits	£3.830m	
Reliability	£5.235m	£2.277m
Present Value of Benefits (PVB)	£57.830m	£45.007m
Present Value of Costs (PVC)	£9.385m	£14.228m
Net Present Value (NPV)	£48.445m	£29.217m
Benefit to Cost Ratio (BCR)	6.16	3.16

The Weston Package is designed to enable the **sustainable development** of Weston. The importance of transport improvements to the regeneration of Weston has been identified in the Vision for Weston and subsequent Weston Area Development Framework. In particular, the Package will reduce the actual and perceived constraint on existing and potential businesses in the town by improving M5 J21, and by improving the Gateway. It will also improve public transport access through the improvements at Worle Station and the enhanced interchange with bus services.

The sensitivity tests undertaken demonstrate that the scheme maintains a 'Very High' Value for Money rating under the varying growth assumptions. For full details of the VfM assessment, refer to Appendix A – Value for Money Report.

3.3 What impact, if any, would the proposed changes have on the statutory orders or permissions required or the timetable for obtaining these?

For example would fresh planning consent need to be sought?

SE1 - As part of the value engineering exercise it was demonstrated that better cost efficiencies could be achieved by widening on the inner circulatory of J21 as opposed to the outer circulatory. This requires land dedication from the HA to the local authority. The HA have agreed this approach and this will be achieved within the project delivery timetable.

SE2 - Land negotiation is progressing well with planning and land acquisition both anticipated well in advance of the bid for full approval in April 2012. However giving the importance of securing the land needed for this element, formal CPO procedures have been started. This will ensure that regardless of negotiations the

land will be available for works to start on site in line with the programme.

SE5 - Planning permission was approved on 25 August 2011.

All TRO's in support of scheme elements will be advertised in January 2012 in order for them to be sealed well in advance of the bid for full approval in April 2012.

3.4 What are the procurement arrangements for the revised scheme and what, if any, changes have been made from the arrangements or timetable proposed for the original scheme? For example would any retendering be required? Have you supplied details of your procurement strategy and arrangements to the Department?

There has been clarification on **SE1** procurement since the original submission but no significant change from the original procurement route set out in the March 2009 Programme Entry bid is proposed.

Detailed comparison and assessment has been undertaken to ensure the chosen procurement routes offer best value and price security going forward.

The proposal is to procure two packages; one comprising **SE1** and the other comprising the remaining package elements **SE2-SE5**.

SE1 – Due to its location and interface with HA assets this project will be procured as a separate package from the other projects utilising the Asset Support Contract (ASC). This will ensure the strategic importance to both the Council and the HA is fully integrated into the decision making process of the contractor and will also ensure the contractor has a high level of HA network knowledge. It will also enable the HA specific procurement requirements to be reflected in this single element.

A summary table detailing the considerations in reaching this conclusion is set out below;

	Separate contract for Element 1	Combined contract for Element 1 with other elements
Cost effective procurement approach?	Yes	Yes for Element 1 but may not be for other elements
Potential to procure under the ASC?	Unknown	Unlikely as ASC contract focussed on HA asset work
Flexible approach?	Yes	No
Facility to share costs between projects?	No	Possible
Reduce preliminary and set-up costs?	No	Possible
Reduce contract costs and administration?	No	Yes

SE2-SE5 - The remaining package elements will be let in accordance with the Restricted Procedure of the Regulations (ECC3 Option A) using North Somerset Council's own standards and procedures.

A summary table detailing the considerations in reaching this conclusion is set out below;

	Four contracts	Two or three contracts	Single contract
Permits phased award of individual contracts?	Yes	Some	No
Mandatory OJEU?	Not likely	Possible	Yes
Local SME eligibility?	Yes	Possible	Unlikely
Flexible approach?	Yes	Some	Some
Facility to share costs between projects?	No	Some	Yes
Minimise preliminary and set-up costs?	No	Some	Yes
Minimise client contract costs and admin?	No	Some	Yes

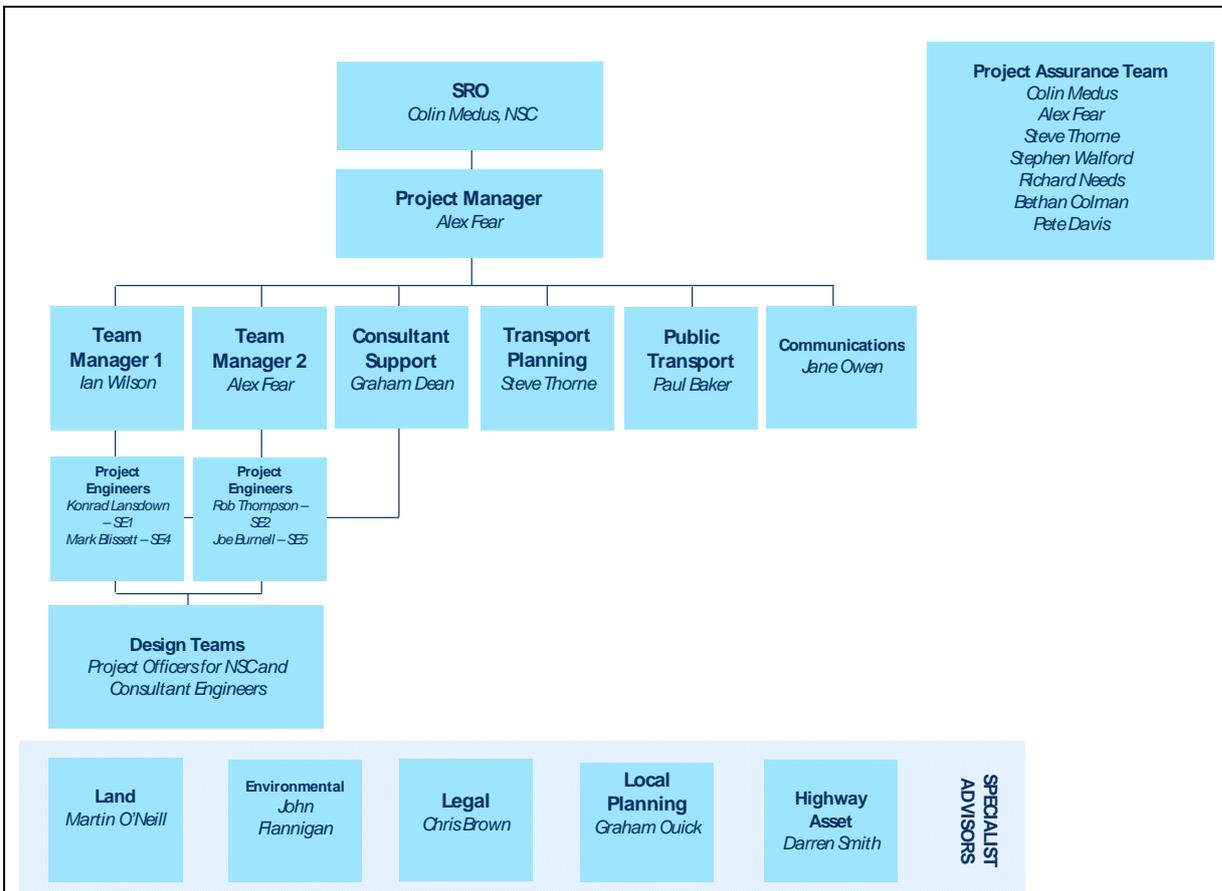
The procurement selection process has started with pre-qualification questionnaire selection in accordance with North Somerset Council's processes underway for **SE2-SE5**. Discussions are well advanced with the HA on ASC procurement for **SE1**.

The timetable ensures that contract prices are available prior to the bid for full approval in April 2012 and to ensure commencement of works in October 2012.

The procurement strategy is in Appendix B and the procurement timeline in Appendix C.

3.5 Please describe the internal / external expertise & skills that will be assigned to the project to allow for its effective delivery. This should detail who / what roles will have overall responsibility for the project and what other skills will be available.

The project is fully resourced and already mobilised, with the necessary expertise to deliver a scheme of this nature. The project team uses a blend of internal local authority staff and external support with the appropriate skills and capabilities. The diagram below sets out key members of the project team for WP1.



The dedicated project team has a wide range of experience and knowledge and a proven track record in delivering complex, high profile civil engineering projects of the type and value proposed within Weston package consistently on time and budget.

Internal

Senior Responsible Owner, Colin Medus has worked in the local authority since 1998 and in the West of England sub-region since 1995. As Head of Highways and Transport Colin has a diverse range of experience from policy to implementation and maintenance. This has involved work on various projects including public transport schemes, cycle infrastructure and highway schemes that interface with HA network (M5 junction 19 improvements). Colin sits on the project board for both the GBBN and AVTM major schemes and is a member of the Programme Delivery Board. He has been involved in this project at every stage of its development.

Project Manager, Alex Fear has 22 years experience in Civil Engineering. Project managed the Civic Pride £12m public realm improvements successfully to time and budget. Manages the LSTF implementation work and manages a team of 9 engineers delivering £3m JLTP schemes annually with projects covering the full range of highway improvement and maintenance work.

Team Manager, Ian Wilson has over 30 years experience in Civil Engineering. Project managed GBBN major scheme work (£5m in NSC); project managed highway improvements at J19 of the M5 which involved similar work to that proposed in WP1 for J21 (SE1); also manages team of 8 engineers delivering £3m JLTP schemes annually.

Project Engineers - The team also consists of fully experienced, competent engineers who have a proven track record of successful project delivery and indeed have been intimately involved in the success of the projects outlined above. The engineers involved are: Konrad Lansdown (SE1); Mark Blissett (SE4); Rob Thomson (SE2&3); Joe Burnell (SE5).

External

Throughout the development of the major scheme bid we have had consistent support through our term consultancy contract with **Halcrow Ltd**. Whilst the Council project engineers are leading on each element, specialist support is brought in where appropriate, for example, in the design of traffic signals and structures.

Advice relating to contractor procurement and contract management has been sought from **EC Harris**, built asset consultants.

Within the West of England sub-region there is a strong culture of sharing knowledge and expertise. This is particularly useful where officers previously involved with the scheme have moved within the sub-region and are still available for input and advice where necessary. We also recognise that Somerset County Council, our neighbour to the south, has considerable major scheme experience. We have therefore involved them in the peer review process.

In the event that further specialist expertise is required and cannot be made available from within the Council or the sub-region, this would be procured through the SWEIP framework. This is an established process, recognised and adopted by all the West of England Authorities.

Programme Delivery Board

The councils, via the Programme Delivery Board, have put in place structures to resource project delivery and ensure consistency between the major schemes. Governance for the three rapid transit schemes is further strengthened through the provision of a Rapid Transit Network Senior Responsible Owner and Integrated Network Manager. These posts will direct the promotion of the rapid transit network with a consistent set of vehicle, interchange and service standards, and co-ordinate integration between the new mode and the wider commercial, supported bus network and rail network, working closely with the scheme SROs, project managers and the public transport teams in the councils. In addition, the SRO and Network Manager will co-ordinate engagement with operators, service provision and procurement, ticketing and fares strategy.

3.6 Please supply a note setting out the governance arrangements for the scheme. *This should also link roles and responsibilities with accountability and arrangements for Reviews as appropriate.*

The creation of the Joint Transport Executive Committee (JTEC) in April 2009 brought together the four authority Executive Members with responsibility for transport in a forum legally constituted via a Joint Working Agreement. The governance and project arrangements for the scheme are shown below.



The Councils set the framework for policy and scheme development which is enacted by the Joint Executive Transport Committee with challenge and advisory roles provided by the Local Enterprise Partnership and Joint Scrutiny Committee.

Meeting quarterly, one of the first actions of the Committee was to approve the governance arrangements, Senior Responsible Owners (SROs) and other key responsibilities across the major schemes programme. This has provided a consistent approach to the project management and governance across the major schemes.

Project Board

The Project Board (PB) is the group which guides and steers the direction of the scheme and is responsible for its delivery. The PB consists of representatives of the Authorities at sufficiently senior level to have the authority to act on behalf of their organisation. Meetings of the PB are linked to key milestones, where they consider highlight and exception reports, changes to the risk log and other key deliverables as defined in the Project Plan.

The Project Board nominates the Senior Responsible Owner (SRO) who is responsible for chairing Project Board meetings and providing guidance and direction to the Project Manager. The SRO ensures the scheme progresses in line with the Project Plan and that outputs and milestones agreed by the Project Board are achieved.

The Project Manager (PM) is responsible for delivering the project in line with the agreed controls and procedures set out in the Project Plan. The PM reports, and is accountable, to the SRO and Project Board. The primary focus of the PM will be to define the Project Plan and to ensure that the project is delivered on time and within specification and budget, seeking additional authorities as necessary.

Project Assurance

The Project assurance participants will help ensure robust and effective review and challenge of the projects processes and procedures to provide assurance that a project is on track to deliver or, conversely, identify actions required.

The participants offer a wide range of key experience and expertise mainly from outside the WEPO area to provide a high level of independence and scrutiny.

3.7 What is the estimated start and completion date of the scheme as now proposed, taking into account any of the impacts described above?

For the purposes of this question assume that decisions on BAFB will be made in December 2011 and that no DfT funding will be available before 2012/13. Please complete the list of milestones below adding any additional ones where appropriate and setting out separate start and completion dates where there are separate elements in the schemes. Please enter "n/a" if not applicable rather than deleting lines.

Milestone	Expected Completion Date
Approval of BAFB from DfT	Dec 2011
Statutory Orders published	January 2012
Detailed design of all elements	December 2011
Public Inquiry Starts	N/A
Confirmation of Orders & CPO	April 2012
Complete Procurement <i>(include separate elements if appropriate)</i>	April 2012
Submit Full Approval application to DfT	May 2012
Work Starts on Site SE1, SE2/SE3	October 2012
Work Starts on Site SE4	July 2013
Works Starts on Site SE5	August 2013
<i>Any significant intermediate milestones (please specify)</i>	
Work Completed SE1	October 2013
Work Completed SE2 and SE3	June 2013
Works Completed SE4	August 2014
Work Completed SE5	May 2014
Opening / commencement of operations <i>(including phases of opening as appropriate)</i>	June 2014

3.8 What are the key risks to the delivery to this timetable, aside from the availability or otherwise of DfT funding?

Please list the biggest risks (ideally no more than three) that have a potentially significant impact on the timing of the scheme. For each risk please describe its likelihood, quantify the potential time delay, and explain how you are mitigating the risk including how risks are transferred as part of your procurement strategy?

1. **Less daytime construction work able to take place for SE1.**
 - Likelihood before mitigation 'medium' (RAG score 3) with delay 3 - 6 months.
 - Mitigation: Early and regular planning with HA and other stakeholders to gain clear understanding of work requirements and constraints has minimised this risk. Maximise daytime working off-line or outside peak periods.
 - Likelihood after mitigation: 'medium (RAG score 2) with delay 1 – 3 months.

2. **CPO required for SE2 due to failure to secure land by negotiation.**
 - Likelihood before mitigation 'medium' (RAG score 2) with delay 3 – 6 months
 - Mitigation: Negotiations are well advanced and progressing. Anticipate land being secured by negotiation but CPO procedures have commenced to ensure land available for start on site.
 - Likelihood after mitigation 'low' (RAG score 1) no delay.
3. **Unidentified utilities encountered during construction of all elements.**
 - Likelihood before mitigation 'medium' (RAG score 2) with delay 3 – 6 months
 - Mitigation: Full and detailed searches undertaken and on site liaison with statutory undertakers has already minimised this risk.
 - Likelihood after mitigations: 'low' (RAG score 1) no delay.

The risk register can be viewed in Appendix D.

3.9 Please indicate the level of allowance you have made within your own budgets to cover the cost of scheme evaluation including your initial estimates of the costs of:

- a) **full scheme impact evaluation**
- b) **pre and post scheme opening monitoring reports**

Please note that funding for scheme evaluation and monitoring will not be available from DfT.

The councils place a strong emphasis on the need for, and the value of, scheme evaluation, both during and following delivery of the scheme. A robust package of performance indicators will be assessed, linked to the scheme objectives including:

Direct Indicators	Indirect Indicators
Q-lengths Q-duration Traffic flows Journey times & reliability Accessibility	Bus patronage Casualty reduction Cycling Rail patronage

a) **Full scheme impact evaluation:**

The role of this scheme is fundamental in supporting the employment led growth strategy for the town. The expectation is that by facilitating new bus services, improving access to rail services and providing better facilities for pedestrians and cyclists, this scheme will help start to reduce out-commuting and increase self-containment. We see an appropriate evaluation of this scheme as important to

ensure the objectives have been met and to inform future work in support of the growth strategy for the town. We will be developing detailed proposals after agreeing the principles with DfT when Programme Entry has been reactivated. At this stage a provisional budget allocation of £50,000 has been identified should a full scheme impact evaluation be required by DfT. This figure is based on an outline estimate to be incurred in 2015/16 and has not been included in the scheme outturn cost.

b) Pre and post scheme monitoring reports

A draft evaluation plan setting out proposed indicators for pre and post scheme monitoring reports has been prepared. The cost estimates are:

- Pre-scheme report 2011/12 - **£9,500**
- Post-scheme report 2013/14 - **£9,800**

SECTION 4: FUNDING FOR REVISED SCHEME PROPOSAL

This section is to detail the cost, revenues and funding requirements for your revised proposal as described in Section 2 above. Please quote all amounts in £m to three decimal points (i.e. to the nearest £1000)

4.1 What is your estimate of the total outturn cost of the revised scheme? *After taking into account all the proposed changes described in Section 2 above. Do not include any pre-Programme Entry costs. Please provide a breakdown of the total cost, split between different elements of the scheme and separately identify preliminaries, project management, risk and inflation. Please also provide your full cost breakdown as an annex.*

Total outturn cost of revised scheme £14.994m

Engineering Works	£6.904m
Land Costs	£1.935m
Staff & site supervision Costs	£1.200m
Preliminaries	£1.697m
Sub-total	£11.736m
Preparatory Costs	£1.709m
Project Management	£0.049m
Outturn QRA (at 50% confidence level)	£0.969m
Inflation (Engineering works)	£0.512m
Evaluation	£0.019m
Sub-total	£3.258m
Total	£14.994m

Breakdown by scheme element

Scheme Element	Engineering Works	Staff & supervision	Preliminaries	Engineering Inflation	Total
SE1	2.737	0.4100	1.015	0.218	4.380
SE2	0.477	0.0850	0.075	0.033	0.670
SE3	0.516	0.0510	0.071	0.033	0.671
SE4	2.038	0.3610	0.334	0.143	2.876
SE5	1.136	0.2930	0.202	0.085	1.716
Subtotal	6.904	1.2000	1.697	0.512	10.313
				Land	1.935
				Evaluation	0.019
				Project Management	0.049
				Preparatory Costs	1.709
				QRA Outturn	0.969
				Total	14.994

Detailed cost estimates are in Appendix E

4.2 Please state what inflation assumptions you are using.

Inflation rates for different categories (e.g. general inflation, construction cost, operating cost) should be separately identified.

Base costs are Q2 2011

Preparation costs: No inflation applied

Land costs: No inflation applied

Construction costs: Applied at **2.79%** per annum
(includes preliminaries/supervision)

Operating costs: not applicable

4.3 Please provide a breakdown of the proposed funding sources for the scheme

(a) Local Authority contribution

*This needs to cover the difference between the total cost of the scheme as stated above and the total of the requested DfT and agreed third party contributions. It should include the LA costs incurred or expected to be incurred after Programme Entry excluding ineligible preparatory costs as defined by previous guidance. Where a local authority is promoting more than one scheme, please detail the level of contribution required if **all** schemes are successful as part of this funding process. Please do not include the cost of any Part 1 Claims.*

<p>North Somerset Council is party to three Major Schemes; if all proceed its contribution (excluding Third Party) would be £10.2516m, split as follows.</p> <p>Weston Package</p> <ul style="list-style-type: none"> North Somerset Council is the only contributing authority and would provide £3.249m <p>Ashton Vale to Temple Meads</p> <ul style="list-style-type: none"> Bristol City Council is the lead authority and would provide a local contribution of £11.8904m. North Somerset Council would provide a local authority contribution of £1.7226m <p>South Bristol Link</p> <ul style="list-style-type: none"> North Somerset Council is the lead authority and would provide a local authority contribution of £5.28m. Bristol City Council would provide a local authority contribution of £8.47m. 	<p>£3.249m outturn (excluding Evaluation Costs)</p>																														
<p>(b) Agreed third party contributions <i>Please name each contributor on a separate line and provide evidence of agreement (e.g. a letter from the funder outlining the degree of commitment, timing for release of funds and any other conditions etc). Note: you will be required to underwrite all third party contributions should these not materialise.</i></p> <table border="1" data-bbox="240 1196 1098 1653"> <thead> <tr> <th colspan="2" data-bbox="240 1196 826 1240"></th> <th data-bbox="826 1196 1098 1240">Balances</th> </tr> <tr> <th colspan="2" data-bbox="240 1240 826 1323">Project/ S106 Funding</th> <th data-bbox="826 1240 1098 1323">as at 21/07/11 £</th> </tr> </thead> <tbody> <tr> <td colspan="3" data-bbox="240 1323 1098 1368">Weston Package Funding</td> </tr> <tr> <td data-bbox="240 1368 395 1413">9LWJ</td> <td data-bbox="395 1368 826 1413"></td> <td data-bbox="826 1368 1098 1413"></td> </tr> <tr> <td data-bbox="240 1413 395 1458">9LWAJ</td> <td data-bbox="395 1413 826 1458">Locking Castle / West Wick</td> <td data-bbox="826 1413 1098 1458">1,296,163.25</td> </tr> <tr> <td data-bbox="240 1458 395 1503">9LCD</td> <td data-bbox="395 1458 826 1503"></td> <td data-bbox="826 1458 1098 1503"></td> </tr> <tr> <td data-bbox="240 1503 395 1547">9LMJ</td> <td data-bbox="395 1503 826 1547"></td> <td data-bbox="826 1503 1098 1547"></td> </tr> <tr> <td data-bbox="240 1547 395 1592">9APJ</td> <td data-bbox="395 1547 826 1592">WSM, Apple Tree Farm</td> <td data-bbox="826 1547 1098 1592">30,048.31</td> </tr> <tr> <td data-bbox="240 1592 395 1637">9LPH</td> <td data-bbox="395 1592 826 1637">St Georges, Locks Paddock</td> <td data-bbox="826 1592 1098 1637">23,788.44</td> </tr> <tr> <td colspan="2" data-bbox="240 1637 826 1682"></td> <td data-bbox="826 1637 1098 1682"><u>1,350,000.00</u></td> </tr> </tbody> </table> <p>The third party contributions are based on Section106 receipts. These receipts are all sourced from signed Section 106 agreements. We have not included copies of these agreements within this bid as they are lengthy legal documents - however, they are available should you require them.</p>			Balances	Project/ S106 Funding		as at 21/07/11 £	Weston Package Funding			9LWJ			9LWAJ	Locking Castle / West Wick	1,296,163.25	9LCD			9LMJ			9APJ	WSM, Apple Tree Farm	30,048.31	9LPH	St Georges, Locks Paddock	23,788.44			<u>1,350,000.00</u>	<p>£1.35m outturn</p>
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<p>(c) DfT funding requested <i>You are reminded that, as set out In the document “Investment in Local Major Transport Schemes” the risk layer cost sharing mechanism is being discontinued and the figure you enter here will, if accepted, be the maximum funding that DfT will provide for the scheme. If you wish eligible preparatory costs (as defined by previous guidance) to be paid these will need to be consolidated within this funding request.</i></p>	<p>£10.395 outturn</p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------

4.4 What is the estimated funding profile.
Assume that no DfT funding will be available before 2012/13. Please specify the third party contributor(s) and list each one (if more than one) on a separate line. Please assume that the DfT and LA contributions will be in the same proportion in each year from 2012/13 and provide an explanation if this is not the case. Although the total level of DfT funding will be fixed, profiles across years may be subject to further discussion and agreement. Please do not include the cost of any Part 1 Claims.

£m	Pre 2011/12	2011/12	2012/13	2013/14	2014/15	Total	%
LA contribution	0.3	0.463050	1.773775	0.655212	0.057242	3.249	21.7%
3rd Party contribution		0.870000	0.085450	0.394550		1.350	9%
1. Locking Castle		0.870000	0.085450	0.340663			
2. Apple Tree Farm				0.030048			
3. St Georges				0.023788			
DfT funding requested			2.979368	5.914726	1.501018	10.395	69.3%
TOTAL	0.3	1.333050	4.838593	6.964487	1.558260	14.994	

There is some flexibility in the programme with regards to construction phasing. Should the scheme be successful in achieving ‘reactivated’ Programme Entry, we would wish to engage with the DfT to consider how best this flexibility can support the funding pressures experienced by the DfT over the life of the CSR.

4.5 If any DfT funding were available in 2011/12 would you be in a position to reach Full Approval and begin claiming such funding and if so how would your funding profile change?
(If appropriate please set out a funding profile similar to that in section 4.4)

No

4.6 Please indicate the level of flexibility with regard to the phasing of the local contribution of the bid (including the third party contribution), should the DfT have a need to vary the phasing of its own contribution for budgetary reasons. Please detail the level of change in DfT support per funding year you could accommodate within the project and from which sources any change would be made up.

We have responded to the review of June interim submissions and your letter in August setting out the pressures that remain on the allocated funding. We have worked hard to reduce our call on DfT funds in 2013/14. We would also be happy to engage in further discussions about what further flexibility could be provided particularly if all 3 schemes that NSC has an interest in are approved.

In addition to the flexibility of profiling within the scheme, through programme management the West of England are well placed to deliver the schemes and draw upon local funding sources to best fit with the DfT's budgetary position.

The increased levels of local contribution set out in this BAFFB comprise of both s106 funding and council capital resources. While there is some flexibility in the deployment of the s106 funding there is less flexibility in the deployment of council capital. This is partly because some of the council capital is being funded annually from council capital resources.

4.7 Please set out the efforts you have undertaken to obtain (additional) third party funding and, where appropriate, why it is not available.

Since the Programme Entry submission the council has been successful in increasing the third party funding contribution to this scheme from £1.1m to £1.35m.

The **£1,350,000** s106 funding has been secured and banked for by the council as the trigger points have all been reached. The council is gifting land to the value of **£1,540,000**, see **section 4.3**. This funding together with the councils allocation of **£1,709,000**, totals **£4.599m**, which represents a total local contribution of **31%** to the scheme outturn.

4.8 Please supply details of likely revenue generated, any ongoing revenue liability associated with the operation of the scheme (other than routine maintenance) and how you intend to fund it. If revenues fall short of those forecast (especially in the early years after implementation) how will these be funded? (This is of particular relevance to public transport schemes but could apply to package schemes.)

No revenue generated

No ongoing revenue liability expected other than routine maintenance

4.9 Please detail any other funding information you think to be of relevance to the bid

(For example other costs or revenue risks etc being taken by the local authority or other parties but not included within the funding table above.)

The Weston Package has been in development for a number of years and up to Programme Entry £0.9m was spent on preparatory costs. These costs are not accounted for in the funding table above.

4.10 Please explain how the Local Authority contribution will be funded.

Explain where local contributions are dependent on a particular source of income and contingency plans if that income is not forthcoming. Please also include any contingency plans for meeting third party costs that fail to materialise.

Section 5 of the Strategic Business Case describes the programme level financial strategy.

Question 4.3 sets out North Somerset Council's contribution to Weston Package is £3.249m, in addition a further £1.35m is to be provided through banked s106 secured by the council. £1.540m of the £3.249m local contribution is council gifted land, the remaining £1.709m is to be funded from council capital budgets and the Council's Medium Term Financial Plan.

The overall position for North Somerset Council across its 3 major schemes is a total local contribution of £10.2516m, excluding third party funding (£16.0416m including third party funding). The total third party funding secured by the council is £5.79m and a further £6.0286m has been secured from council capital resources, leaving £4.223m to be funded. The Council is addressing the £4.223m shortfall through its Medium Term Financial Plan (MTFP) and have agreed that the major transport schemes have priority 1 status. This means that as the MTFP is developed and implemented over the next few years, the major transport schemes will have the first call upon emerging financial resources. The MTFP recognises that funding could be made available from a range of funding streams including the New Homes Bonus (NHB) and the Community Infrastructure Levy (CIL), which will be introduced by late 2012. Detailed projections on the amount of funding that will be available from the NHB and the CIL for transport infrastructure during the course of the construction phase of the 3 major transport schemes is not yet available. However, the Council is committed to these schemes and will arrange its funding allocations accordingly to ensure appropriate resources are in place.

In the unlikely event that the New Homes Bonus, the CIL and other funding streams being developed through the Councils Medium Term Financial Plan are not sufficient to cover the remaining £4.223m to fund the local contributions for the 3 major transport schemes, the council as a last resort would opt for prudential borrowing.

SECTION 5: STAKEHOLDER MANAGEMENT

5.1 Consultation

Please provide a brief overview of the consultation you have undertaken to date with

- (a) the public,*
- (b) statutory environmental bodies and*
- (c) other stakeholders;*

*This should include dates detailing when consultation was carried out
Please also summarise any further consultation you plan to undertake.*

Strategic Engagement

Working under the Travel+ brand the authorities, together with the Local Enterprise Partnership, have continued to build on the high level of public and stakeholder awareness across the major schemes programme.

Joint information leaflets, meetings and events have helped the public and stakeholders to understand the linkages between the schemes, the importance they have to supporting the future growth of the area, and the promotion of consistent messages.

Each SRO has developed a scheme specific communications strategy to manage contact with local public and stakeholders to their scheme. These are shared via the PDB and West of England Joint Communications Officer ensuring that the interrelationship between the schemes is not forgotten, duplication is avoided and no gaps are left.

Local Engagement

The consultation messages adhered to the core principles of the project; namely **employment led growth; reducing town centre congestion and network resilience.**

Extensive consultation began in 2009 which helped to shape the details of the scheme. In 2011 a revised Communications Strategy was then put in place and North Somerset Council appointed dedicated resources to communicate the details of the Weston Package to key stakeholders (Refer to Appendix F). Intensive consultation was undertaken during June, July and August 2011 with a planned mix of communication methods that included; road signs, web sites; social media, presentations, meetings and letter drops.

A total of 42 letters and emails have been received from the business community, 372 people completed the online survey, 1,058 viewed the Weston Package webpage and over 36,000 people have had the opportunity to see information about the Weston Package via social media.

a) Public Engagement

A new web page was created on the North Somerset Council website to give information on the Weston Package. The website address was advertised through

roadside signs and in letters and emails that were sent out between 30 May and 31 July 2011. Over this period 1,058 people viewed the web page.

The local newspaper, the Weston and Somerset Mercury, ran articles on the Weston Package. The endorsement of John Penrose MP for Weston-super-Mare and Minister for Tourism & Heritage, also resulted in a flurry of media coverage in the Weston Mercury and on BBC News, Somerset.

The electronic survey ran from 27 June to 1 August 2011. 372 people answered the question concerning support for the Weston Package. The results show that 93% of respondents support the proposals.

The top four positive comments fall into the following categories:

1. Better for business/tourism/jobs (47 comments)
2. Improve traffic flow/reduce congestion (25 comments)
3. Better public transport (8)
4. Cleaner/better environment (8)

Only 7 people thought the scheme wouldn't deliver the improvements they felt were needed.

Social media

The council was able to make use of Twitter and Facebook to give out information and invite comments about the Weston Package. This proved a good way of communicating the message to residents, especially the younger age profile.

b) Statutory Stakeholders

Comments were received from the Environment Agency, Natural England and English Heritage in spring/summer 2009.

Further engagement with SEBs has been undertaken as part of the design and planning of the appropriate scheme elements.

1. Environment Agency & IDB

The EA and Internal Drainage Board were consulted during production of the flood risk assessment and again during the planning process for SE5.

2. Natural England

An Ecological Assessment has been undertaken for SE1 and an Ecology Report has been received. Liaison regarding badger surveys and mitigation are continuing.

The Council Ecologist has also been consulted and acted as liaison with NE.

3. English Heritage

Landscaping requirements will be taken into consideration in scheme designs and site investigation works have been undertaken where appropriate.

The County Archaeologist was consulted early in the project programme and an archaeological site investigation carried out as a result of his comments.

c) Other Stakeholders

Local and national businesses

A detailed list of key businesses that would be affected by the Weston Package was developed. The list included developers, large local trade groups and smaller local businesses. Face-to-face visits were arranged during June/July/August 2011, so that plans could be discussed in detail and any questions/concerns addressed.

The support of First Bus and Network Rail around the changes in Elmham Way and at Worle Station was welcomed.

Retailers

Many of the businesses are multi-nationals with local management making it particularly difficult to speak to the right people. To make sure that all the businesses were contacted, a 'ground assault' was mobilised with letters being hand delivered to every business within the area.

As the retailers were visited they were able to ask questions on-the-spot and any reservations or problems could be discussed and explained. This approach resulted in no objections to the plans.

Politicians, local councils and councillors

Officers attended the full council meeting of Weston-super-Mare Town Council on 4 July 2011 to give a presentation on the Weston Package. Numerous questions and a great deal of discussion were followed by a letter of strong support for the scheme.

Relevant parish councillors were emailed with information and North Somerset Council Parish Clerks were briefed.

Constant information was given to the Leader of the Council and the Executive Member for Highways and Transport.

5.2 Letters of support

Please append any letters of support explaining strategic importance of scheme especially from the Local Enterprise Partnership and business groups.

These should detail, where possible, the particular outcomes they believe the scheme will deliver. Where a LEP includes more than one scheme it will be important that they differentiate between schemes, and prioritise if possible.

We have over 100 letters in support of all the five West of England schemes.

These include the Local Enterprise Partnership, Business West, the CBI, Bristol Airport, Forum for the Future, North Bristol Sustainable Commuting Partnership, Bristol Zoo, SETsquared, HFT Trust Ltd, Quantum Science Park, Elizabeth Shaw Chocolates, Hotel du Vin, Bristol City FC, architects Stride Treglown and the SS Great Britain trust. These letters are appended to the strategic case.

The consultation from June to August this year has generated a large amount of support amongst local businesses, with many of them writing in letters and emails. A list of the **42** letters so far received and copies of this support can be found in Appendix G. In particular, it was pleasing to receive support from all major trade

groups and developers.

GVA Grimley Limited has written on behalf of its clients the Homes and Communities Agency (HCA) and St Modwen Properties Plc. St. Modwen has written in its own right too. This partnership is leading an **employment led**, mixed use site at Locking Parklands that is expected to provide opportunities for up to 2,000 new jobs and 1,500 homes.

St Modwen also owns employment sites at Hutton Moor and Westland Distribution Park on Winterstoke Road.

The Arcadia Housing Group is a major employer in Weston-super-Mare and is planning to close its five regional offices to build a new 40,000 sq ft headquarters in Weston-super-Mare on land near Junction 21 of the M5.

Trade organisations

Support from local trade organisations has been strong and many of the small and medium sized businesses registered their views through these organisations.

In particular, the Weston-super-Mare and District Chamber of Trade and Commerce wrote on behalf of its 91 members in support of the schemes. North Somerset Industrial Association has written in support after discussing the Weston Package plans with its membership of 25 key businesses.

“For the Industrial Association the main reason is the improved access for deliveries and despatches. Upon this the health and many present and future companies depends as, of course, does the future job opportunities of the people of Weston. We wish you success in this essential bid.” **Charles Walker, Chairman, North Somerset Industrial Association.**

Tourism

Tourism businesses have been quick to support the Weston Package plans which many see as complimenting the other investment and infrastructure developments in the town.

The Weston-super-Mare Hotels and Restaurants Association that represents over 120 tourism businesses in the town has sent in its full support for the Weston Package.

“...the Weston Package aims to address current congestion issues, unlock major development potential, complement other investment in Weston (and the South West) as well as help to deliver significant sustainable development and Weston, and I wish to register our full support for it.” **Keith Fearn, President, Weston-super-Mare Hotels and Restaurants Association.**

One of the largest tourism businesses in the town, the Grand Pier, has written in support of the scheme.

Educational organisations

Weston College has become an increasingly important organisation within Weston-super-Mare with its new additional university campus and increased student numbers. The college is fully supportive of the Weston Package.

“The proposals outlined within the Weston Package bid will help to ensure the future of Weston-super-Mare as a thriving community which offers a safer, greener environment with education, training and employment opportunities accessible to all. Improvements to the bus routes, links between rail and bus travel and easing the congestion around Junction 21 of the M5 will play an integral part in assuring much needed development and regeneration.” **Judi Harper, Vice Principal, Weston College**

Further Consultation

Consultation continues with the stakeholder list and letters are still arriving from businesses. Meetings and briefings continue to be held. The council intends to continue with the collection of this information even after the bid is submitted and the Communications Activity working document will continue to be kept up-to-date. Plans are in place to pick up any loose ends from the comments made through the survey, letters, emails, and social media.

If the bid is successful, communication would continue into 2012 and beyond to keep businesses, organisations and residents informed of progress. This continual communication should assist with any problems encountered during the construction phase.

5.3 Opposition

Please describe any significant opposition to the proposed scheme, the reasons for this opposition and how you are dealing with their concerns?

The challenges

There has been little actual opposition to the scheme either through the survey or within letters and emails received.

There were six main challenges for this consultation to address that we identified in advance. By identifying these issues early we were able to address concerns in our strategy for consultation.

1. The potential for mixing up the Weston Package with other transport initiatives

Ensure an understanding of what the scheme included. It was important to ensure the message was very clear to mitigate this risk.

2. The potential for objections from the large retailers around the Marchfields Way area

Where relevant staff were available at the stores they were briefed in person. This resulted in a great deal of verbal support and a few concerns which were addressed as they arose. Argos, Sainsburys and McDonalds were among the letters received all of which were supportive of the package.

3. The inertia of stakeholders

The support for the Weston Package was almost universal with those contacted. However, getting people to send their thoughts in writing was much harder.

4. The time of year

Holidays of key staff during July and August presented some challenges. T

5. Each of the 5 elements within the Weston Package had a different set of stakeholders

By dividing the consultation into schemes, we were able to make sure that all the right stakeholders were included for the relevant information.

6. Strong level of animosity by local press to council-led schemes

We were able to overcome this by letting others tell the story to the media rather than the council. Weston-super-mare Town Council and John Penrose MP issued information that appeared in a positive way in local press.

As mentioned previously, the majority of comments from the general public were positive (**93% of 372 comments**). Those people who made the very few negative comments were satisfied with immediate response by email or telephone, so that concerns were addressed and plans explained in more detail.

SECTION 6: ADDITIONAL INFORMATION

6.1 Please add any additional information that is relevant to your Best and Final Funding Bid that is not covered elsewhere in the form.

The **Strategic Business Case** overview provides further detail on the strategic context and the way in which the authorities will develop, procure, deliver and fund the schemes, deriving additional benefit at the programme level. Key points include:

- The schemes are closely aligned with the Area's forecast to deliver 72,000 new homes and 74,000 new jobs by 2026.
- The schemes directly serve the Local Enterprise Zone, Enterprise Areas and other major employment sites which are expected to deliver 60,000 new jobs by 2026.
- By improving connectivity between businesses, and between businesses and their workers, the schemes are forecast to deliver £356m of Gross Value Added (2010 prices), a £1.10 GVA return on every £1 of transport investment.
- The Area has well-established governance arrangements built around a Joint Transport Executive Committee and a track record for delivery. This Committee is being integrated into new LEP structures involving business.
- The authorities are developing a programme level approach to procurement and risk management to drive down cost and increase delivery certainty.
- The programme is also sufficiently flexible to complement national priorities and the availability of funding.

The authorities are committed to bringing forward these schemes and have an innovative, coordinated funding package to provide significant local contributions to ensure they are delivered.

List of appendices

- WoE WP Appx A VfM summary report
- WoE WP Appx B Procurement Strategy
- WoE WP Appx C Procurement Programme
- WoE WP Appx D Risk Register (QRA)
- WoE WP Appx E Detailed cost estimates
- WoE WP Appx F Stakeholder Consultation Report
- WoE WP Appx G Letters of support
- WoE WP Appx H Communication Strategy
- WoE WP Appx I Evaluation Plan
- WoE WP Appx J Risk Management Strategy
- WoE WP Appx K Project Programme

- WoE WP Appx L Project Assurance
- WoE WP Appx M Scheme Drawings

List of Modelling Reports (attached)

- MR1. WoE WP Modelling 1. Forecasting Report - Revised report
 MR2. WoE WP Modelling 2. Cost Benefit Analysis Summary
 MR3. WoE WP Modelling 3. Annualisation Report 010911
 MR4. WoE WP Modelling 4. Do Minimum Schemes and Sensitivity Tests
 MR5. WoE WP Modelling 5. Accident Appraisal Technical Note
 MR6. WoE WP Modelling 6. SDI Summary
 MR7. WoE WP Modelling 7a. NATA Worksheets and 7b. F Forms
 MR8. WoE WP Modelling 8. TUBA input/output files (no hard copy)

6.2 Please provide details of any other information that has been submitted to the Department since January 2011 that forms part of your submission *(This should include name of the document and date of submission.)*

Document Title	Date Submitted	Location on Promoter Website
WoE WP SD1 G-NS v2.2 Public Transport Report _Final 090320	April 2009	www.travelplus.org.uk
WoE WP SD2 G-NS v2 2 Demand Model Development Report _Final 070409	April 2009	www.travelplus.org.uk
WoE WP SD3 G-NS v2.2 Highway LMVR (Final 090326)	April 2009	www.travelplus.org.uk
WoE WP SD4 Environment Report	April 2009	www.travelplus.org.uk
WoE WP SD5 TN - Atkins Response to DfT Comments v4	September 2009	www.travelplus.org.uk
WoE WP SD6 Weston Reliability Method Report	30 June 2011	www.travelplus.org.uk
WoE WP SD7 Weston Rail Benefits Report	30 June 2011	www.travelplus.org.uk

Notes:

BAFB Form and Link to the 5 Case Model

The following section provided to bidders to detail which elements of the form relate to the 5 cases used in decision making.

Case	Elements of the BAFB Form
Strategic Case	1.1, 1.2, 1.3, 1.5, 2.1,2.2, 2.4, 2.5, 3.1, 3.2, 5.1, 5.2, 5.3
Financial Case	1.4, 2.2, 2.3, 2.4, Section 4
Economic Case	3.2 (and Appendices)
Management Case	3.3, 3.5, 3.6, 3.7, 3.8, 5.1, 5.3
Commercial Case	3.4, 3.5,3.7,3.8