

BIRMINGHAM CITY COUNCIL

Moseley Road Baths Levelling Up Fund



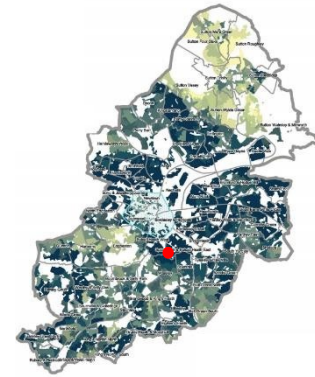
"More than 100 swimmers from across the UK took part in a one-off photo event on Sunday aimed at highlighting the plight of one of Birmingham's most important community buildings. The 100 Swimmers, a project by photographer Attilio Fiumarella, saw the empty pool at Moseley Road Baths in Balsall Heath filled with swimmers, photography fans, city heritage enthusiasts and community supporters in reaction to the news that Birmingham City Council intends to close the historic building permanently in 2015." – Birmingham Post

Index of Multiple Deprivation - Birmingham



Executive Summary

Investing in infrastructure has the potential to improve lives by giving people pride in their local communities; bringing more places across the UK closer to opportunity; and demonstrating that government can visibly deliver against the diverse needs of all places and all geographies. Communities across Birmingham and the links between them are fundamental parts of our shared economy, culture and society.



As set out within the Levelling Up Fund Prospectus, “economic differences remain between different parts of the UK, including our cities, ex-industrial towns, and rural and coastal communities. These economic differences have real implications: they affect people’s lives through their pay, work opportunities, health and life chances. Tackling these economic differences and driving prosperity as part of ‘levelling up’ left behind regions of the UK is a priority for this Government”. The Levelling Up Fund provides an opportunity for investment into targeted locations across Birmingham to level up longstanding local economic differences that have stifled the broader regional economy, but also significantly impact the local communities and their ability to thrive.

Following a review of potential Tranche 1 schemes across Birmingham against the funding criteria, Moseley Road Baths was deemed a priority for the city. The following application form sets out a clear case for investing into this much needed heritage and regeneration scheme. Throughout the document, the four following priorities of the Levelling Up Fund have been highlighted:



Characteristics of the place – setting out a clear narrative for why investment is needed within the specific location and how the associated characteristics align to the broader Levelling Up objectives.



Deliverability – setting out the financial, management and commercial cases for investment, with capital expenditure in 2021/22 that will quickly unlock the benefits aligned to the Levelling Up objectives.



Strategic fit with local and Fund priorities – clearly identifying how the scheme contributes to local, regional and national priorities.



Value for money – an economic case, explaining the benefits of the scheme and how it represents value for money.

Birmingham City Council are delighted to have the opportunity to receive capital investment into a scheme that will deliver a step-change in community belonging, whilst enabling local economic growth, improved wellbeing and social cohesion.

Moseley Road Baths in Balsall Heath is an **internationally significant** Grade II* listed Edwardian swimming pool and public baths, it is the oldest of only 5 Grade II* listed baths currently open for its original purpose. It is located within central Balsall

Heath within the Sparkbrook Ward, a few miles south of Birmingham's city centre and a key pillar of the Balsall Heath High Street.

Transforming the Moseley Road Baths and Library into a cohesive, interconnected structure will provide much needed benefits for those living in and around the Balsall Heath area, which has some of the city-region's **most disadvantaged communities**. Balsall Heath is currently in the top 1% of deprived neighbourhoods nationally.



The area around Moseley Road Baths experiences high levels of deprivation and barriers to growth in comparison to the rest of the region. Securing the long-term future of the Baths through the proposed renovation will not only allow the Baths to stay open for swimming and provide a **key health service to the local community**, but also provide a site of national significance that will encourage **growth in local businesses and stimulate the economy**. The proposed renovation will diversify the services provided to include gym, fitness and wellbeing activities. Moseley Road Baths has been a cornerstone of the local community for over 110 years. This project will safeguard the long-term future of the Baths to ensure the benefits to the local community for the foreseeable future.



These benefits align with the local, regional, and national objectives, including those of the **Balsall Heath Neighbourhood Development Plan (2015-2031)**, the **Urban Centres: A Framework for Inclusive Growth (2020)**, the **Birmingham Health and Wellbeing Strategy (update 2017)** and **Our Future City Plan, BCC (2021)** amongst others.



The scheme has a total estimated capital cost of **£32.406m**. The financial approval sought by this proposal totals **£15,539,000**. Without government investment, the inevitable costly deterioration of the much-valued civic amenity will result in the eventual



decline of the Baths. The Levelling Up Fund provides the opportunity to not only return the Baths back to a condition which better reflects its cultural and social significance, but to also transform the building by integrating the adjoining library to create a unique, multipurpose space.

Moseley Road Baths regeneration is being delivered by a coalition of partners including BCC, the National Trust, Historic England, World Monuments Fund and a Charitable Incorporated Organisation. This scheme is **deliverable immediately** and has **support from local stakeholders** and community groups. It **has MP endorsement** and will provide a great foundation from which to kick-start the local economy and broader ambitions for improved placemaking and connectivity to growth.





Levelling Up Fund Application Form

Applicant & Bid Information

Local authority name / Applicant name(s):

Birmingham City Council

Bid Manager Name and position:

Dave Wagg, Head of Sport and Physical Activity, Birmingham City Council

Contact telephone number:

0121 464 0939

Email address:

dave.wagg@birmingham.gov.uk

Postal address:

Alexander Stadium, Walsall Road, Birmingham, B42 2LR

Nominated Local Authority Single Point of Contact:

Phil Edwards

Senior Responsible Officer contact details:

Chris Jordan

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0121 3036143

Chief Finance Officer contact details:

Rebecca Hellard

Rebecca.hellard@birmingham.gov.uk

0121 303 4233

Country:

England

Scotland

Wales

Northern Ireland

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

Arcadis Consulting UK Ltd, Simerica - Jacobs UK Ltd

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**

Yes

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

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**

Yes

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

No

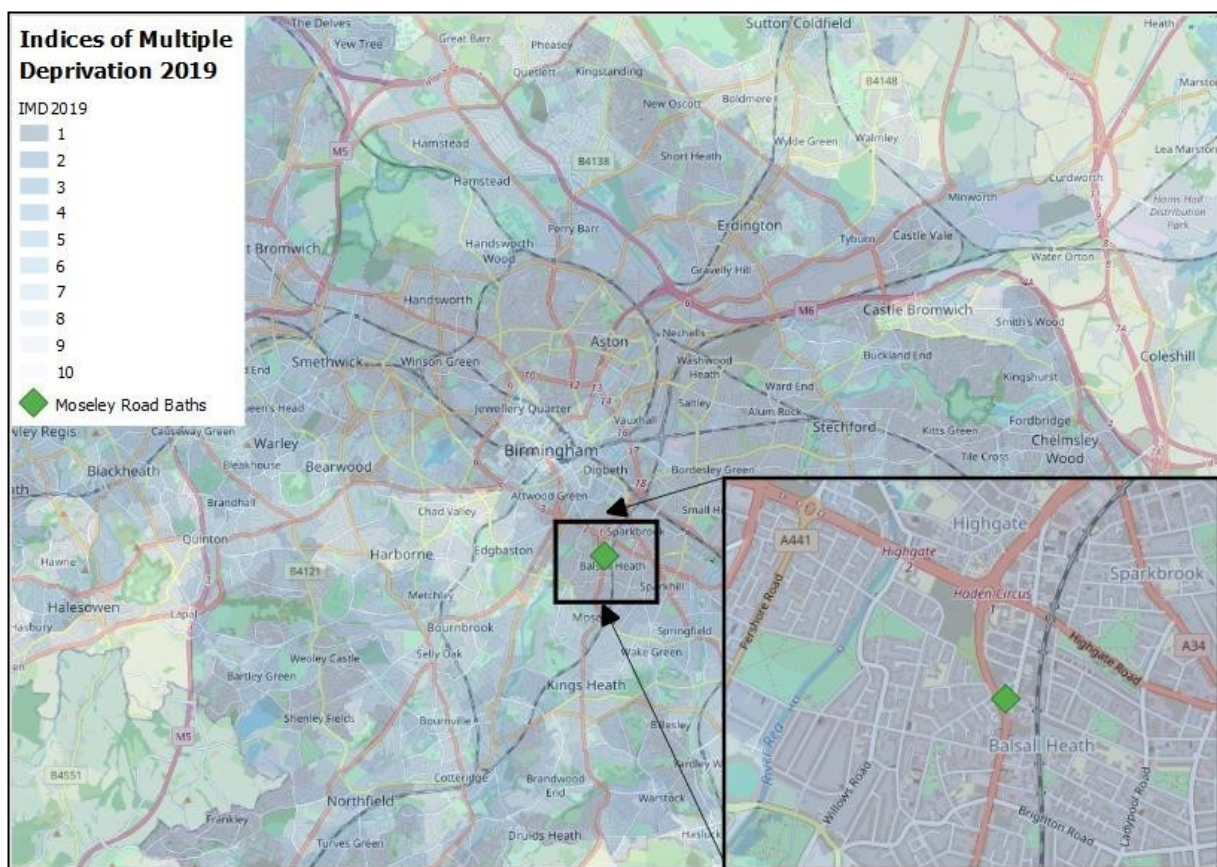
(ii) **Northern Ireland bids only** Please provide evidence of the delivery team having experience of delivering two capital projects of similar size and scale in the last five years. (Limit 250 words)

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)

The Moseley Road Baths scheme aims to provide social and health benefits to the local community through investing in the Grade II* listed Edwardian swimming pool and public bath alongside the connected Library building.

Transforming the Moseley Road Baths and Library into a cohesive, interconnected structure will provide much needed benefits for those living in and around the Balsall Heath area, which has some of the city-region's most disadvantaged communities. Balsall Heath is currently in the top 1% of deprived neighbourhoods nationally. The graphic below shows Balsall Heath is located within the most deprived decile according to the Indices of Multiple Deprivation 2019.



Statistics show residents of highly deprived areas are more likely to experience health issues such as cardiovascular disease, unhealthy lifestyles and drug/alcohol misuse. This is evidenced with Balsall Heath having higher mortality rates than the Birmingham average, together with higher rates of hospital admission.

Diversity

Balsall Heath is a dynamic community. It is home to a significant immigrant population, with 90% of the population being BAME and over half of residents are from a South Asian background. Balsall Heath also has one of the largest Muslim communities. In addition, the area also has one of the youngest age profiles compared to other areas of Birmingham, with 30% of residents under 16 and 45% under 25 years of age.

Life expectancy rates are much **lower** than the **Birmingham and UK average** and a higher number of **long-term limiting illnesses** reported, with **20% of adults** with a long-term illness and **8.7% of residents** reporting **bad or very bad health**. When compared to the **English average of 5.5%**, there is clear health disparity in the neighbourhood.

Economy

In terms of the economy, Balsall Heath has a higher rate of unemployment compared to the Birmingham and national average. Of those employed, 50% of are working in lower skilled occupations and nearly half of working age adults have no qualifications. 12% of the population live on employment benefits compared to 6.4% nationally; 3.1% of the population live on incapacity benefits compared to 2.4% nationally.

The area around Moseley Road Baths experiences high levels of deprivation and barriers to growth in comparison to the rest of the region. Securing the long-term future of the Baths through the proposed renovation will not only allow the Baths to stay open for swimming and gym visits and provide a key health service to the local community, but also provide a site of national significance, encouraging the growth in local businesses and stimulating the economy. Moseley Road Baths has been a cornerstone of the local community for over 110 years with generations of people learning to swim there. This project will safeguard the long-term future of the Baths to ensure the benefits to the local community for the foreseeable future.



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:

[Birmingham levelling up fund](#)

PART 3 BID SUMMARY

3a Please specify the type of bid you are submitting

Single Bid (one project)

Package Bid (up to 3 multiple complimentary projects)

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

We are proposing to invest in transforming Moseley Road Baths into a vibrant hub for culture, leisure, heritage and wellbeing with swimming at its centre. Its magnificent historic spaces and vibrant programmes will bring people together, addressing local needs around health, wellbeing and skills and providing pleasure and inspiration for visitors from near and far. It will consist of the following:

- Transform swimming, creating an internationally celebrated heritage bathing experience that meets local needs.
- Open 6 redundant spaces within the Baths for café, leisure and wellbeing activities, converting one pool into a programmable venue; increasing footfall from 15k - 300k annually.
- Physically connect MRB and BHL Balsall Heath Library and remodel the interior space of the library.
- Create a community garden and programmable / pop up green space behind the Baths as well as providing vital infrastructure to support the sustainability of the new facilities.
- Coproduce a wellbeing and heritage programme within and beyond the buildings with partners locally and across the city; e.g. tours, activities, events, creative installations/shows.
- Undertake an interim/short term phase of defensive building repair and reservicing works to the Baths to safeguard the continuation of swimming during project development.
- Attract over £13m investment into the city's heritage and Balsall Heath community.
- Establish appropriate governance and management models for the operations which enable partnership working between BCC and the local community as operators.
- Evaluate a model of organised social action for sustainable heritage which others can replicate.
- Support the designation of a new Conservation Area and Town Square zone on the Moseley Road.

Direct benefits will be realised through improvements to health and wellbeing whilst indirect economic benefits will also be generated through transforming Moseley Road Baths into a nationally significant attraction through local business growth and investment into the deprived local area.

3c Please set out the value of capital grant being requested from UK Government (UKG) (£). This should align with the financial case:	£15,539,000						
3d Please specify the proportion of funding requested for each of the Fund's three investment themes	<table border="1"> <tr> <td>Regeneration and town centre</td> <td>100%</td> </tr> <tr> <td>Cultural</td> <td>0%</td> </tr> <tr> <td>Transport</td> <td>0%</td> </tr> </table>	Regeneration and town centre	100%	Cultural	0%	Transport	0%
Regeneration and town centre	100%						
Cultural	0%						
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

4.2 Stakeholder Engagement and Support

See technical note Table 1 for further guidance.

4.2a Describe what engagement you have undertaken with local groups 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)

Consultation with the local community and stakeholders about the future of the Baths has been ongoing since c2018. It has included surveys, filming, interviews and a social media takeover. Business planning, demographic and market research has also been undertaken.

An initial consultation process was held in 2018 to understand the hopes and ideas of the wider community. This was led by Civic who led focus groups and joined local events to understand the community better. Different ideas and activities were tested with visitors to the Balsall Heath Festival in 2018 and they brought together and listened to local entrepreneurs, and operators. This helped to design a scheme that would be relevant to the community, appropriate to the historic spaces and financially viable and self-sustaining.

Other consultation activity has included:

- Swimmer Survey, Moseley Road Baths CIO. An online survey, 2018
- Moseley Road Baths Alive Survey, Moseley Road Baths CIO. An online survey, 2019
- Contemporary Art at Moseley Road Baths, David Viney. An online survey, 2019
- Conversations with local VCSO leaders, National Trust. Interviews, 2020
- Swimmer Survey, Moseley Road Baths CIO. An online survey, 2020
- Spirit of Balsall Heath, National Trust. Film/Interviews 2020
- Community consultation, National Trust. Social media takeover, 2020

Interviews were conducted with local VCSO leaders to understand local needs, services and potential for collaboration. There was a strong desire to explore partnership working with some areas for collaboration identified:

- Boost the local economy through inclusion in construction supply chains
- Cross venue collaboration in programming
- Partner in service delivery to fill gaps in provision locally.

Interviews with Moseley Road Baths CIO identified areas for organisational development, which include a focus on workforce development and strategic planning.

The consultations evidenced a strong desire by local people for investment in the baths with many stating their health and wellbeing, both physically and mentally, would be impacted if the baths were to close. There was a strong preference for maintaining it as a building for use by the local community, with swimming kept and a variety of other community-oriented uses. There has been a positive reaction to the community-led take-over of swimming and a demand for a programme of non-swimming activity on site. This includes fitness classes and other activity designed to improve physical and mental wellbeing as well as community-led activity ranging from social groups to civic meetings and programming of cultural, arts and heritage activity. Feedback from consultations informed the design of the scheme and activity schedule of the Baths.

A summary of the consultation responses has been provided in the table below to highlight audience's key focus:

Audience	Focus
Current and new users of MRB	Quality of experience and wellbeing
Balsall Heath School Children	Self-esteem and creative learning
Balsall Heath 16-25s	Participation, skills, enterprise and well-being
Balsall Heath over 60s	Well-being and connection
Balsall Health families	Quality time and creative learning
Targeted groups (e.g. disabilities, LGBTQ, language)	Quality and variety of experience

Corporate users	High quality space, service and opportunities
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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)

There are no formal objections to the scheme through consultation.

The project has been instigated by and is co-led by the community working within the City Council. This is seen a crucial element of the scheme to ensure benefits are maximised to 'Level Up' effectively.

A coalition of organisations was formed in 2017, led by the National Trust, to support Birmingham City Council in securing the future of Moseley Road Baths as both a building and a functioning pool. Members are Birmingham City Council, MRB CIO, Friends of MRB, Historic England, the National Trust and the World Monuments Fund.

Together, the focus is on:

- Keeping the pool open for swimming
- Building 'triage' (urgent attention to make it watertight and stop deterioration)
- Communications, and
- Securing the longer-term future of the Baths.



Friends of Moseley Road Baths is a group founded in 2006 with the purpose of keeping the Baths open. In 2017, the Baths had been scheduled to close. An Action Group, that included the Friends of Moseley Road Baths, came together to investigate ways of keeping the Baths open. The Action Group came up with a plan to run the Baths as a non-profit community enterprise.

Letters of support have also been received by the Mayor and the Local Enterprise Partnership. These are included in Appendix H and Appendix I, respectively.

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)

This diverse population faces many challenges and barriers to growth as the area has experienced high levels of deprivation over the past few decades, which is still the case today. Balsall Heath is currently in the top 1% of deprived neighbourhoods nationally and Sparkbrook & Balsall Heath East is the most deprived ward in Birmingham. As an area of deprivation, there has been less potential for development investment.

Statistics show local people experience health issues most often associated with high levels of deprivation, including cardiovascular disease, unhealthy lifestyles and drug/alcohol misuse. This is evidenced within Balsall Heath which has mortality rates higher than the Birmingham average, together with high rates of hospital admission. Life expectancy rates are much lower than the Birmingham and UK average and a higher number of long-term limiting illnesses reported, with 20% of adults with a long-term illness and 8.7% of residents reporting bad or very bad health. When compared to the English average of 5.5%, there is clear health disparity in the neighbourhood.

In terms of the economy, Balsall Heath has a higher rate of unemployment compared to the Birmingham and national average. Of those employed, 50% of are working in lower skilled occupations and nearly half of working age adults have no qualifications. 12% of the population live on unemployment benefits compared to 6.1% nationally; 3.1% of the population live on incapacity benefits compared to 2.4% nationally.

Although the Covid-19 pandemic has had an adverse impact on those who live in Balsall Heath, it also highlighted the high levels of social capital and strong sense of community, spirit of action and local identity that exists in Balsall Heath. Community organisations reached out to one another and collaborated in a way which would not have been possible in other times. At the heart of this was a willingness to be creative and flexible in finding the best way to support individuals in crisis.

As we emerge from the pandemic, there will be a need for spaces where people feel safe and welcome. When consulted the needs identified by local people included improving mental health, access to 'nice' facilities, improved general health and community cohesion. Moseley Road Baths, at the physical heart of Balsall Heath

Employment, income and life expectancy are among the lowest in Birmingham

Structural inequality and racism experienced by Black and Asian residents

Top 1% of deprived neighbourhoods nationally

Higher than average rate of unemployment compared to Birmingham and national average

50% of those employed are in lower skilled occupations

50% of working age adults have no qualifications

20% of the population live on benefits

can play an important role as a convenient and neutral space, staffed by people from within the community who have shared in the experiences. The fact that swimming numbers have remained high when the pool has been able to open, speaks volumes about how much people value the space and trust staff to keep them safe. The Moseley Road Baths scheme responds to this need to come together in a shared space, to imagine and build projects and initiatives which focus on our growth and development as a community.

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

Moseley Road Baths is an internationally significant Grade II* listed Edwardian swimming pool and public bath. They are on the World Monuments Fund's Watch list and are a priority at-risk site for Historic England, the Edwardian Society and the Victorian Society. MRB are the oldest of only five Grade II* listed baths open for public swimming, containing Britain's only surviving set of 46 'slipper baths' and steam-heated drying racks, a magnificent Gala Pool and second-class pool.

Without government investment, the inevitable irretrievable deterioration of the much-valued civic amenity will result in the eventual permanent closure of the Bath due to the costly maintenance of the Grade II* listed building. The Levelling Up Fund has provided the opportunity to not only return the Baths back to a condition which better reflects its cultural and social significance, but to also transform the whole building by integrating the adjoining library to create a unique, sustainable multipurpose space.

Government investment is needed to transform Moseley Road Baths into a heritage-led well-being, leisure and cultural destination that provides excellent value to local residents in response to their needs and motivations. The project will unlock the potential in local people, significantly improving their health and wellbeing, and catalysing investment into the wider regeneration of Balsall Heath. It will make a bold statement about civic activism, and about how Birmingham values and champions its heritage and communities.

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)

The Moseley Road Baths scheme is proposing to invest in the following:

- Transform swimming, creating an internationally celebrated heritage bathing experience that meets local needs.
- Open 6 redundant spaces with the Baths for café, leisure and wellbeing activities, converting one pool into a programmable venue; increasing footfall from 15k - 200k.
- Physically connect MRB and BHL Balsall Heath Library

- Remodelling of the interior space of the library
- Create a community garden and programmable / pop up green space behind the Baths as well as providing vital infrastructure to support the sustainability of the new facilities.
- Coproduce a wellbeing and heritage programme within and beyond the buildings with partners locally and across the city; e.g. tours, activities, events, creative installations/shows.
- Undertake an interim/short term phase of defensive building repair and reservicing works to the Baths to safeguard the continuation of swimming during project development.
- Attract over £13m investment into the city's heritage and Balsall Heath community



What if..... the Baths reimagined post investment

Economic Regeneration:

As a 'destination and dwell' scheme, the MRB scheme will help to support placemaking and rejuvenate urban centres. A public value assessment conducted for the scheme indicated that the project could deliver c£150m in additional economic benefit over 60 years through investment into the local economy from increased visitors to the area, revenue to local businesses and construction contracts. The project will continue feeding into city plans to designate a new Conservation Area centred on the Baths and develop a Town Square zone, maximising investment to improve the public realm.

Skills and jobs:

The scheme will see the creation of approximately 10 FTE during the project, and more than 12 new jobs in the expanded business. Employment opportunities will be targeted locally and construction apprenticeships, work placements, traineeships and skills placements will be available, increasing employment rates in the area. The young urban community will have access to alternative routes to learning, with support through the library around digital literacy and job applications and provide student placements, paid apprenticeships and trainee programmes that lead to new skills and formal qualifications. A range of volunteering opportunities will also be available with bespoke training to make it easy for people to get involved and build skills and confidence.

Our young urban community will have access to alternative routes to learning, with support through the library around digital literacy and job applications. We will work with partners such as South and City College, and the city's universities to provide student placements, paid apprenticeships and trainee programmes that lead to new skills and formal qualifications.



Community Cohesion:

The programme will provide integrated services and facilities, with multiple ways to engage and join-in, all with the aim of improving health and wellbeing, encouraging social cohesion between communities. Activities and social events in the Baths and Library will be curated so that different communities interact with each other, promoting cohesion and understanding. MRB will be social infrastructure at its most open and democratic, supporting belonging and sense of place, through an operational model that increases hours and range of services, co-locates facilities and provides safe, inclusive and inspiring spaces.

Further details can be found in **Appendix A**

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 logic map can be found in **Appendix B**.

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 Balsall Heath Neighbourhood Development Plan (2015-2031) sets out the key development needs in Balsall Heath in terms of economic, social and environmental improvement, in order to achieve locally driven growth. Within the plan, it identifies a need to strengthen social infrastructure and specifically states that the Moseley Road Baths are ‘very needed assets and all should be done to protect these services’. The Moseley Road Baths and Balsall Heath Library project will provide a vital piece of social infrastructure which will bring together the different communities within Balsall Heath, supporting delivery of the policies set out in the plan.

Urban Centres: A Framework for Inclusive Growth (2020). This framework focuses around encouraging local communities to create successful and vibrant places that sit at the heart of thriving neighbourhoods and to accommodate a range of uses and activities that meets the needs of all. By restoring Moseley Road Baths as a ‘destination and dwell’ project, MRB will support placemaking and help rejuvenate Balsall Heath as an urban centre. This is likely to have a ripple effect on investment in Balsall Heath, supporting the levelling up agenda.

The Birmingham Skills Investment Plan: 2016 to 2026 aims to get more residents into work and reduce unemployment by boosting the skills and qualifications of people to meet employer’s needs. The MRB scheme aligns strongly with this plan as the project will create a number of new jobs during development and after completion of the scheme. These opportunities will be targeted locally and construction apprenticeships, work placements, trainee ships and skills placements will be offered within the operation. This will contribute to upskilling the local residents and provide them with relevant skills for employers.

The Birmingham Health and Wellbeing Strategy (update 2017) key priorities include improve the wellbeing of children, improve the wellbeing of the disadvantage and make Birmingham a Healthy City. The MRB project will provide the community positive outcomes of mental and physical wellbeing through the range of leisure and cultural programmes offered. The project will also use work with social and health



care providers to offer 'social prescriptions' and help reach potentially isolated audiences by offering accessible and inclusive facilities.

Birmingham Heritage Strategy, 2014 to 2019. This strategy is currently under review, however the MRB project reflects the key purpose of the strategy which is to preserve, prioritise, encourage participation in and promote the city's heritage. The restoration, reservicing and adaptation of the Baths gives a unique opportunity to address MRB's 'at risk' status and reimagine both heritage buildings in a contemporary context. The project will be a major catalyst for heritage-led regeneration in Balsall Heath supporting wider neighbourhood and public realm improvements.

Our Future City Plan, BCC (2021). Balsall Heath features in Birmingham City Council's 'Our Future City Plan' (2021). The area has been identified as a central renewal area with potential for significant change and reimagining to unlock new opportunities for mixed use redevelopment. The project will transform MRB into a heritage-led well-being, leisure and cultural destination that provides excellent value to local people in response to their needs and motivations.

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)

Sport England: Towards an Active Nation, (2016 – 2021). MRB aligns with a number of Sport England's strategy and investment programmes. This includes tackling inactivity and barriers to becoming active, particularly in under-represented groups who are less likely to take part. The MRB scheme will provide upgraded swimming facilities as well as a range of fitness activities and classes based on the local need designed to improve physical and mental wellbeing.

The scheme also has a strategic fit with the **Integrated Communities Strategy (Green Paper 2018)** which includes policy proposals to 'mitigate residential segregation and support people to build strong and integrated communities' and 'increase economic opportunity' to achieve integration. Sport and leisure facilities act as vital pieces of social infrastructure that present strong 'bridging capital' in diverse communities. The scheme will provide integrated services and facilities, with multiple ways to engage and join-in, all with the aim of improving health and wellbeing in an accessible, vibrant and beautiful environment. Activities and social events in the Baths and Library will be curated so that different communities interact with each other, promoting cohesion and understanding.

The Arts Council's Let's Create Strategy (2020-2030) sets out three key outcomes: creative people, cultural communities and a creative and cultural country. All these outcomes are supported by the MRB scheme as a programme of culture, arts and heritage activity, from theatre, music and art to spa therapies and historical tours, which will be able to be held at the Baths and Library, thus enriching the culture of the local community.

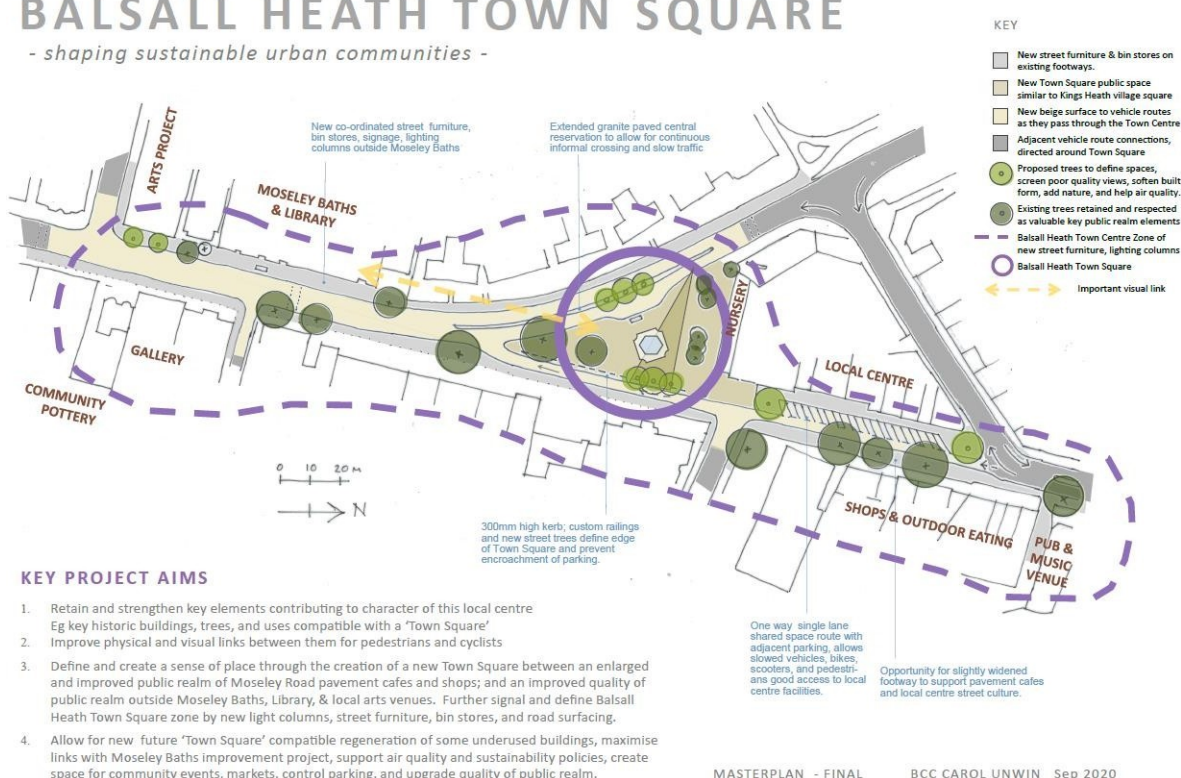
4.4c Where applicable explain how the bid complements / or aligns to and supports other investments from different funding streams. (Limit 250 words)

The project complements initiatives to designate a new Conservation Area in Balsall Heath and develop a Town Square zone and maximise investment across shared/communal spaces to improve public realm. The Baths complement these investments by helping to define and create a sense of place within the Balsall Heath community and providing a hub for the community where people can come together.

The improved public realm of the Town Square will massively increase the visual and physical connection between Moseley Baths and Arts Hubs and the local centre shops and restaurants. This will likely encourage more visitors to the Baths by making it more accessible and aesthetically pleasing which in turn will lead to inclusive growth within the community.

BALSALL HEATH TOWN SQUARE

- shaping sustainable urban communities -



The Baths project builds on previous investment in the area in heritage and cultural organisations such as the Moseley School of Art, the Old Print Works and Clifton Road Mosque. The project will contribute to and benefit from plans to establish a local district council and a town square on Moseley Road.

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)

Moseley Road Bath indirectly supports the shift towards cycling and walking by providing facilities for local people on their doorstep. There are around 20,000 people within walking distance of MRB and BHL, including 12/13 schools which already swim at the Baths. There is a potential for building towards a 15-minute neighbourhood disincentivising the use of non-active modes.

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)

Sparkbrook & Balsall Heath East is the most deprived ward in Birmingham, (2019) with Balsall Heath having pockets of living environment deprivation that feature in the top 5% and 10% most deprived nationally. The rate of unemployment in Balsall Heath is higher than the average for Birmingham and the national average and the rate of claiming any benefit (which includes in work benefits) is more than 25% higher in Balsall Heath than the national average. In addition, Balsall Heath has 20% fewer high and intermediate and intermediate managerial, administrative or professional households than the national average.

According to the latest Census data, the percentage of residents in Balsall Heath rating their health as 'very bad' was more than the national average, suggesting that the health of the residents of Balsall Heath is generally worse than in the average person in England. This continues to be evidenced in 2021 with the two wards of Balsall Heath West & Sparkbrook and Balsall Heath experiencing some of the highest Covid-19 case rates in the city, being consistently in the top third of Birmingham wards. As of February 2021, Balsall Heath West sat 7th out of 69 wards in rate cases per 100,000 residents. The pandemic has starkly exposed health and economic inequalities in this community. There is a very real concern that the social and economic challenges that Covid-19 has exacerbated, will become the new normal in people's lives.

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)

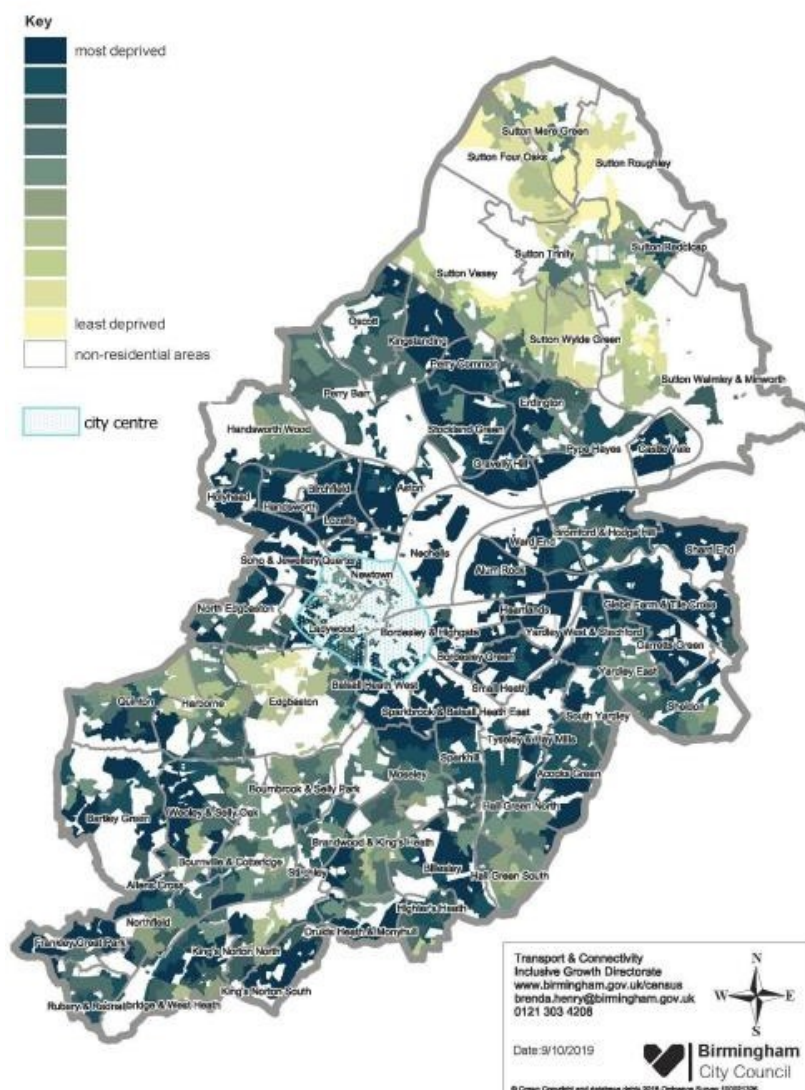
Extensive research has been conducted over the past three years to establish a strong evidence base for demonstrating the benefits of the MRB proposals. This research has included analysing the socio-economic, health and education data for the Balsall Heath area of the city as well as consulting with local residents within the area. This has provided a robust understanding of the scale and significance of the local problems and issues, which the scheme aims to address.

To understand the scale of local problems in Balsall Heath, numerous national data sources were reviewed. This included analysis of the English Indices of Deprivation, 2019, which provides statistics on relative deprivation in small areas in England called lower-layer super output area. It is a government dataset calculated using a set of relevant measures which can be used to infer the living conditions of different neighbourhoods. The latest release of the indices of deprivation data was used for the analysis of Balsall Heath, which revealed that Balsall Heath is the most deprived ward in Birmingham.

Additionally, Census data was used to analyse the population composition within Balsall Heath and the health of residents in the area. The most recent Census data set from 2011 was used to analyse the local problems experienced by the Balsall Heath community, which demonstrates that the health of the residents of Balsall Heath is generally worse than in the average person in England.

A report on the impact of Covid-19 on Balsall Heath was produced in 2021 based on the Birmingham Covid Dashboard and Public Health England data, which demonstrates the existing social, economic and health inequalities compared to the rest of the city. The two wards of Balsall Heath West & Sparkbrook and Balsall Heath have experienced some of the highest case rates in the city, being consistently in the top third of Birmingham wards.

2019 English Index of Multiple Deprivation - Birmingham



In addition to data analysis, consultation with the local community and stakeholders about the future of the Baths has been ongoing since c2018 which has provided a considerable amount of recent evidence of the needs of local people as well as support for the MRB scheme. Evidence was collected via surveys, filming, interviews and a social media takeover as well as business planning, demographic and market research which has also been undertaken. The range of consultation activities allowed local and regional audiences to be reached and provide a robust evidence base for local challenges.

The results of the consultation identified the needs of local people which also reflected issues apparent from the statistics:

- Access to 'nice' facilities and places to meet socially that aren't expensive.
- Improved general health (weight loss, better nutrition and cardiovascular health)
- Employability skills
- Community cohesion through social events so that different communities get to talk to each other.

- Reducing social isolation stemming from cultural and language barriers.

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

The data and evidence chosen to be used for the MRB scheme was based on demographic data that had been collected from pool users, including volunteers. This data showed that the visitors closely reflected the demographics of the local community, with the majority of regular visitors, just over two thirds, living in the postcodes B12 and B13.

Based on this information, the data and evidence that was chosen to demonstrate local problems and issues was confined to the ward of Balsall Heath, where the MRB scheme is located.

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)

Moseley Road Baths is anticipated to have an extensive impact on the local economy including both Economic and Social impacts. The Table provided below highlights each of the benefits which have been assessed alongside a description.

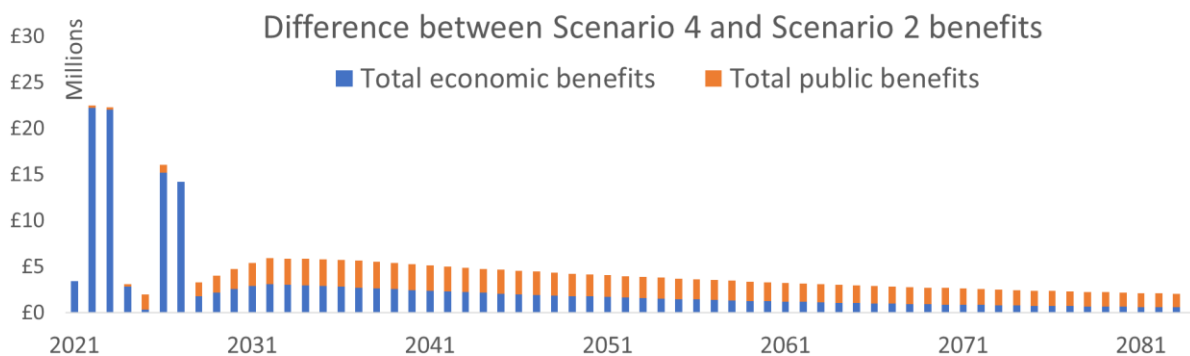
Type of impact	Impact	Description of impact
Economic	GVA visitors	Gross-value added analysis to measure the contribution to GDP of increased visitors based on the revenue that it would bring to the baths. Note this benefit is based on the increased operational revenue.
	Construction GVA impacts	Gross-value added analysis to measure the contribution to GDP of the construction work on the baths, based on construction spend
	NHS cost savings from swimmers	Cost savings to the NHS on account of improved health of people due to the increase in swimming
	NHS cost savings from gym users	Cost savings to the NHS on account of improved health of people due to the increase in gym use
	NHS cost savings from library users	Cost savings to the NHS on account of improved mental health associated with library use
Public	Wellbeing value - swimmers	The monetary wellbeing value of becoming a regular swimmer
	Wellbeing value - gym users	The monetary wellbeing value of becoming a regular gym user
	Wellbeing value - library users	The monetary wellbeing value of becoming a regular library user
	Sense of pride WTP	Sense of pride for households within 3km based on WTP to keep industrial heritage site maintained (non-use value)
	Wellbeing value - Volunteering (unskilled)	The monetary wellbeing value of becoming a volunteer
	Wellbeing value - Volunteering (skilled)	The monetary wellbeing value of becoming a volunteer and undergoing some training
	Wellbeing value - Skills & training	The monetary wellbeing value of undergoing some job-related training

Benefits have been presented as a comparison between a 'Without Scheme' scenario defined as minimum level of intervention required to keep the Baths open alongside a 'With Scheme' scenario incorporating the additional benefits generated from the transformed Baths and Library. Benefits have been profiled over a 10 and 60-year period as follows.

Results (10-year appraisal)			
Type of impact	Without Scheme	With Scheme	Difference
Economic Benefits	£14,904,814	£101,480,446	£86,575,632
Public Benefits	£30,788,865	£39,649,321	£8,860,456
Total Benefits	£45,693,679	£141,129,766	£95,436,087
Total Costs	£8,757,012	£41,677,536	£32,920,524
NPV			£62,515,563
BCR			2.90

Results (60-year appraisal)			
Type of impact	Without Scheme	With Scheme	Difference
Economic Benefits	£32,900,689	£199,501,541	£166,600,852
Public Benefits	£160,580,319	£281,109,377	£120,529,058
Total Benefits	£193,481,008	£480,610,918	£287,129,910
Total Costs	£22,225,007	£66,120,057	£43,895,050
NPV			£243,234,860
BCR			6.54

The difference in benefits split into each of the economic and public benefits are also presented below.



Benefits by scenario - 60 year appraisal



The benefits calculated can be split into four main categories:

- Economic impacts (GVA)
- Wellbeing impacts
- Cost savings to the NHS
- Sense of Pride

The economic impact of the scheme calculated using Gross Value Added (GVA) demonstrates the economic benefits the scheme. Levelling up the local economy requires economic stimulus to help grow local businesses and bring economic activity into the area. MRB will result initial construction impacts boosting the local economy followed by increased footfall in the area as a result of the scheme. Around £150m additional economic benefit is expected to be brought into the area.

Additionally, visitors to the Baths will also benefit from significant wellbeing impacts in an area where current levels of deprivation impact on the local community's health and wellbeing. Around £117m in health and wellbeing benefits are expected as a result of the scheme, which includes the training of skilled and unskilled volunteers.

Cost savings to the NHS are expected as a result of improving the health of the local population resulting in less time spent utilising NHS resources.

Finally, sense of pride and cultural heritage benefits have also been measured using a willingness to pay methodology which has resulted in a £4m benefit being calculated.

Overall, the economic and wellbeing impact of the scheme will be integral in helping to level up the deprived local area of Balsall Heath. MRB will help to attract jobs and businesses providing much needed opportunities to the local community.

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)

Benefits were assessed using a predictive social value assessment, conducted by Simerica-Jacobs, to forecast the public value that could be generated by MRB. This included the Gross Value Added to the Economy, Cost savings, Cultural value and social wellbeing value.

Forecasting

Forecasts have been based on historical footfall estimates which have been grown in-line with predicted levels of growth. Uplifts in demand as a result of the scheme have been based on professional judgement and are considered to be conservative estimates in comparison to evaluation evidence. Due to the unique nature of the scheme, evaluation evidence of a similar scale and geographic location are not readily available however the following studies have been taken into account (others not listed):

- Withington Baths, Manchester
- Bramely Baths, Leeds
- Victoria Baths, Manchester
- Lido, Bristol
- Cleveland Pools, Bath
- Meta Study - <https://www.artscouncil.org.uk/sites/default/files/download-file/Libraries-CommunityHubs-Renaisi.pdf>

Methodology and outputs:

The methodology and outputs were valued robustly based on Simerica's own published and peer-reviewed social value research and research from the academic literature that employs best-practice methodology (e.g. UK Government Additionality Guide). The values represent a combination of the value to individuals and communities (in terms of improved Quality of Life) and the value to Government (in terms of impacts on the Exchequer). Treasury best practice in business case construction¹ was followed, and a range of statistical corrections to the economic and social impact assessment from The Green Book were incorporated across the analysis.

¹ <https://www.gov.uk/government/publications/libraries-alternative-delivery-models-toolkit/stage-6-business-case>

This included calculating the value of benefits with appropriate discounting in line with HM Treasury Green Book Guidance and applying an optimism bias value of 20%.

Economic Impact:

UK-Government multipliers were applied to estimate the direct and indirect value added to the economy. MRB data on construction and operational investments were matched to Government data sources on multiplier effects within the wider community. This method of estimating benefits through gross value added is supported by HM Treasury Green Book and consistent with social cost-benefit analysis.

Public value (preference-based approach):

The economic value of goods or services, as defined in the theory that underlies the HM Treasury Green Book is a measure of the change in human welfare, or utility, that results from it. Employing a Total Economic Value (TEV) framework we can identify a primary categorisation of use and non-use values associated with heritage assets like MRB.

The Department of Culture, Media and Sport (DCMS) have developed a Bank of Values for different types of cultural institutions. These values have been obtained from multiple valuation surveys designed and analysed by Simetrica and provide a robust set of average willingness to pay values to work out public value.

Public value (life satisfaction-based approach):

The Social value calculations in the MRB assessment are based on the Wellbeing Valuation (WV) method, which is an HM Treasury approved methodology that puts a monetary valuation on a particular outcome based on its measurable impact on individual wellbeing. This monetary valuation usually represents a compensating welfare measure in that it is the amount of money that would have to be given to the individual to result in the same increase in welfare as the outcome being valued.

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 +. 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)

Costs have been presented in both discounted and undiscounted forms in order to provide a read-across to the financial case. A discounted Present Value Cost of £66.1m has been used for the purpose of economic based calculations such

as the BCR. The 'Without Scheme' costs are deducted from this total in the same way as benefits to provide a reasonable counterfactual for the scheme.

Adjustments have been made in line with government guidelines on appraisal:

- Optimism Bias: Costs are uplifted by 20% to account for the tendency of project planners to underestimate costs of a project (HM Treasury 2018 Green Book supplementary guidance)

Net present value: The value of future benefits was calculated with appropriate discounting in line with HM Treasury Green Book Guidance (2020):

- Present values are estimated for revenue and costs over 10 and 60-year periods, producing a final Net Present Value (NPV)
- For economic valuation, a 3.5% discount rate is applied for the first 30 years, declining to 3% afterwards
- For public valuation, a 1.5% discount rate is applied which drops to 1.29% after 30 years (HM Treasury Green Book 2020)

Discounting future benefits at HM Treasury's recommended rate of 3.5% per annum (reflecting the lesser value people place on future benefits than current). Inflation allowance of 15%

2021 prices, undiscounted	2021/22	2022/23	2023/24	Future Years	Total
	£'000	£'000	£'000	£'000	£'000
CAPITAL EXPENDITURE					
Capital - Levelling Up	£884	£8,158	£6,497	£0	£15,539
Capital – NLHF	£25	£246	£222	£0	£493
Other development costs	£72	£722	£650	£0	£1,445
Delivery stage				£14,520	£14,520
Additional Costs and Contingency				£410	£410
Total Capital Expenditure	£980	£9,126	£7,369	£14,930	£32,406
Operational Expenditure	£554	£585	£607	£65,386	£67,132
Total Expenditure	£1,534	£9,712	£7,977	£80,315	£99,538
Total Expenditure + 20% Optimism Bias					£119,445
Total Expenditure in 2021 prices and values					£66,120

The scheme costs in 2021 prices including optimism bias used for the economic appraisal is £66.1m over a 60-year appraisal.

5.4 Analysis of monetised costs and benefits

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

In accordance with the Capital Investment Manual and requirements of HM Treasury's Green Book (A Guide to Investment Appraisal in the Public Sector) the most economically advantageous offer has been selected for the scheme, which best fulfils the strategic objectives and optimises VfM.

The monetised benefits of the MRB scheme have been estimated using a predictive social value assessment conducted by Simerica. A number of different methods have been applied to estimate the economic and public value of MRB as well as the non-market value of cultural heritage.



Type of impact	Without Scheme	With Scheme
Total Economic Benefits	£32,900,689	£199,501,541
Total Public Benefits	£160,580,319	£281,109,377
Total Benefits	£193,481,008	£480,610,918

Gross Value Added (GVA) to the local economy

An estimated £150 million will be added to the local economy in terms of direct economic activity from visitors to the baths as well as indirect supply chain effects from construction and investment in MRB.

To estimate impacts on the local economy, UK-Government multipliers were applied. MRB data on construction and operational investments were matched to Government data sources on multiplier effects within the wider community to estimate benefits.

The impact assessment for the operational period included the full set of economic impacts produced by the site annually:

- Direct (the economic activity generated by National Trust investments exclusive of the activity of suppliers of goods and services),
- Indirect (supply chain impacts generated by the suppliers of goods and services)

Economic multiplier effects from the construction period, based on the Moseley Road Baths Master Plan document were also applied.

This method of estimating benefits through gross value added to the economy is supported by HM Treasury Green Book 2020 and consistent with social cost-benefit analysis.

Cost savings

Cost savings/tax contributions due to project investment provide a proxy for the values to society more widely, measured as impacts on public services and on the public purse (Exchequer). This includes benefits of a reduction in state health-related expenditure on account of improved health associated with use of the scheme. For MRB, the economic benefit of cost-savings to the NHS was assessed to provide an estimated benefit of £17 million. Cost-savings capture the benefits to society more widely (in the form of 'secondary benefits').

Public value (preference-based approach): Cultural value bank: Heritage sites

To estimate the monetary benefits of the sense of pride (and therefore willingness to pay) that will be provided by investment in MRB, a Total Economic Value (TEV) framework was employed. This allows non-market goods, such as sense of pride, that don't have market value but nonetheless improve welfare, to have a value attached to them.

This was performed using the Department of Culture, Media and Sport's (DCMS) Bank of Values for different types of cultural institutions, published in 2021. These values have been obtained from multiple valuation surveys designed and analysed by Simetrica and provide a robust set of average willingness to pay values that are transferable to comparable sites. Using these values, benefits were transferred by taking estimated values from similar sites and applying them to MRB. This method provided £4 million of estimated benefits.

Public value (life satisfaction-based approach): Social wellbeing values

For the social value calculations for the MRB scheme, a tool developed by Simetrica-Jacobs was used to estimate well-being values that are produced through the scheme. It uses a large repository of social values generated using Green Book-consistent valuation methods. The social value calculations are based on the Wellbeing Valuation (WV) method, which is an HM Treasury approved methodology that puts a monetary valuation on a particular outcome based on its measurable impact on individual wellbeing. The public value impacts that were assessed are shown in the table below:

Impact	Description	Benefits
Wellbeing value – swimmers	The monetary wellbeing value of becoming a regular swimmer	£28,083,583
Wellbeing value – gym users	The monetary wellbeing value of becoming a regular gym user	£49,084,756
Wellbeing value – library users	The monetary wellbeing value of becoming a regular library user	£15,476,556
Wellbeing value – volunteering (unskilled)	The monetary wellbeing value of becoming a volunteer	£25,858,785

Wellbeing value -volunteering (skilled)	The monetary wellbeing value of becoming a volunteer and undergoing some training	-£1,899,068
Wellbeing value -Skills & training	The monetary wellbeing value of undergoing some job-related training	£11,778
Total	All wellbeing benefits	£116,616,389

Wellbeing values from within the social value repository relating to employment, skills and training were applied. The value of training for volunteers and apprentices and work experience placements using Masterplan data and data from the NT Roundhouse project.

In all cases where Wellbeing Values were estimated, lower bound estimates were applied to avoid over-estimation of public benefits.

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

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

Tab B – Discounted benefits by category (£m)

5.5 Value for money of proposal

5.5a Please provide a summary of the overall Value for Money of the proposal. This should include reporting of Benefit Cost Ratios. If a Benefit Cost Ratio (BCR) has been estimated there should be a clear explanation of how this is estimated 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)

The following table outlines the construction of the benefit cost ratio. Benefits are presented in 2021 prices and values

Type of impact	Without Scheme	With Scheme:	Difference
Total Economic Benefits	£29,963,163	£199,501,541	£166,600,852
Total Public Benefits	£153,932,293	£281,109,377	£120,529,058
Total Benefits	£193,481,008	£480,610,918	£287,129,910
Total Costs	£20,033,528	£66,120,057	£43,895,050
NPV			£243,234,860
BCR			6.54

A BCR of 6.54 is considered **very high** value for money. Benefits and costs have been presented in 2021 prices and values in line with MHCLG's appraisal guidance.

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)

Economic assessment has been undertaken to monetise the wide range of impacts expected as a result of the scheme. This includes both economic and wellbeing-based assessments considering less tangible benefits such as civic pride. Therefore, benefits for the scheme overall have been monetised and non-monetised impacts have not been included.

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)

Risks and uncertainties have been identified within the forecasts of swimmers, library visitors and gym users. Historical data has been used alongside professional judgement to determine the likely impact of the scheme. Comparative studies have

also been considered to which suggests the current forecasts are likely to be conservative. The Value for Money category of very high is unlikely to be impacted by the demand forecasts.

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)

Moseley Road Baths Financial Cost Profile (£000's)	2021/2022	2022/2023	2023/2024	Future Years	Total
CAPITAL EXPENDITURE (LUF only)					
Capital Works *	£520	£5,168	£4,215		£9,903
Fees	£104	£1,071	£880		£2,056
Other Capital Costs	£0	£185	£0		£185
Contingency	£179	£992	£811		£1,982
Inflation	£80	£742	£591		£1,413
Total Capital Expenditure	£883	£8,158	£6,497		£15,539
Capital Funding					
Birmingham City Council	£22	£262	£210	£9,505	£10,000
National Lottery Heritage Fund	£50	£500	£450	£5,425	£6,424
Levelling Up Fund	£565	£8,264	£6,709	£0	£15,539
Historic England	£223	£100	£0	£0	£323
World Monuments Fund	£120	£0	£0	£0	£120
Total Capital Funding	£980	£9,126	£7,369	£14,930	£32,406

* (inc 10% construction contract contingency)
Any discrepancy in the table due to rounding error

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)

The only gap is the funding requested in this Levelling Up Fund application.

A National Lottery Heritage Fund application has been made, currently awaiting response. The funding confirmation is expected before the Levelling Up Fund decision point. The remaining funds are expected to come through the Levelling Up Fund subject to National Lottery Heritage Fund approval. If the National Lottery Heritage Fund does not come forward, the project would be rescoped to fit within the funding amount secured.

A further £0.1m is also pending approval from Historic England. This would be covered by either Birmingham City Council or National Lottery Heritage Fund if unsuccessful.

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)

An application for the National Lottery Heritage Fund has been made, currently awaiting response.

A funding amount of £0.223 million has been confirmed from Historic England and £0.130 million from the World Monuments Fund. Other third-party contributions total £1.344 million. Match funding of 20% the total project cost has also been committed from Birmingham City Council. Total funding agreed by Birmingham City Council totals £10m.

There have been no failed funding bids thus far.

Confirmation letter from the World Monuments Fund has been provided in **Appendix C**.

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

The project will be managed by a competent and experienced project management team, with monitoring by a coalition Board of local, national and international organisations. The risk assessment process will record delivery risks throughout the life of the project and associated mitigation measures. The Risk Register contains a contingency plan against each task.

Based on learning from other heritage construction projects and with input from industry experts, the following allowances have been made to manage budget fluctuations:

- Construction contract - 10% margin for cost increases during tender.
- Design development - 5% of contract sum against changes during detailed design.
- Risk register – allowance equating to <3% for risks identified in the construction risk register
- Project contingency – 10% unforeseeable project risks associated with working in historic buildings
- Inflation allowance – 10% of capital cost (5%pa), based on current inflation trend in the construction industry driven by release of pent-up demand, material cost increases and labour shortages due to Brexit.

The following arrangements are in place to support the delivery of the required outputs:

- Stage Reviews during development and delivering, plus a Post Implementation Review.
- Identify where improvements / changes are required to be made;
- Put in place a delivery strategy to implement the identified improvements / changes; and
- Seek approval and funding, if required.

A rigorous options appraisal has been undertaken which provides costed alternatives should issues be encountered with the preferred scheme. A considerable amount of background and technical information is also available

about the proposals to inform planning, and essential surveys/investigations have been prioritised to mitigate construction cost risks.

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)

A full risk register is provided in **Appendix D**.

The table below demonstrates a selection of key financial risks associated with the delivery of the programme, the associated consequences, and mitigation where required.

Risk	Risk Event	Consequences	Mitigation
Funding Gap	Unable to bridge the funding gap due to unsuccessful funding applications or limited timescale to raise funds	Shortfall on project cost or need to curtail project which may impact on benefits/outcomes. Confidence of decision-makers in relation to project delivery will be impacted.	Procuring professional support to plan and deliver a targeted fundraising plan for the project - securing expertise in different types of fundraising and ensuring quality of applications and contacts. If necessary, the scope/cost of the project will be reduced, avoiding significant impact on outcomes
Costing	Costs overrun	Requirement to reduce scope or compromise specification (value engineering). Potential loss of benefit Inability to bring parts of building into full use. Failure to secure approvals to proceed. Requirement to retender (time and money)	Revise, refine and consolidate capital costs whilst other specialist consultants / surveys will have informed cost estimates resulting in a high level of confidence in cost estimates. Contingency and inflation have been built into the project costs.
Operational Costs	Operating costs vary from budget, poor performance	Additional revenue would be required in the longer term.	Develop firm operational model as a high priority.

	standards or the service cannot be provided.		
Building works overrun	Building works overrun, leaving little time for get in and programmes to mature	Increased cost of keeping the project going. Shorter period of project support in initial handover and operational phase. Difficulty achieving business plan targets Pressure on CIO team and business Less time to train staff and volunteers	Detailed planning/modelling of construction strategy, programming and phasing of works to minimise disruption to the operation >Business continuity and risk planning to address potential delays; e.g. recruiting new staff, increasing off site
Market buoyancy	Actual inflation differs from assumed inflation rates.	Additional costs required to deliver completed programme.	Monitor tendering trends and provide inflation allowance within contingency.

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)

All procurements will be tendered through an open public procurement process overseen by Birmingham City Council's Procurement Services Section. Before commencement of any procurement activity, a planned procurement activity report will be taken through the governance process of BCC for approval and sign off.

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)

	Key Project Milestones	Planned Delivery Dates
Phase 1 works	Boardroom / Managers Flat	
	Works tendered	June 2021
	Start on site	September 2021
	Works complete	March 2022
	Building fabric repairs/ restoration	
	RIBA Stage 2 and 3 design	December 2021
	Planning and Listed Building Consent	March 2022
	Technical design and works tender	June 2022
	On-site	September 2022
	Works complete	March 2023
	Library remodelling delivery (and Phase 2 design)	September 2021
	Procure professional team	February 2022
	RIBA Stage 2 and 3 design (incl Phase 2 works)	September 2022
	Planning and Listed Building Consent	January 2023
	Technical design and works tender	April 2023
	On-site	July 2023
	Phase 1 works complete	March 2024

	Post Implementation Review (phase 1)	May 2024
Phase 2 works	Phase 2 funding approvals	March 2024
	Phase 2 works	
	Technical design and works tender	June 2025
	On site	October 2025
	Building handover to operation	March 2027
	Post Implementation Review	June 2027
	Benefit review	June 2028

The project will follow a clear governance process, including tiered accountability, defined roles and responsibilities, and gateway review / decision making points.

Full delivery plan has been provided in **Appendix E**.

Senior governance

The Moseley Road Baths scheme will be managed at senior level by a Partnership Project Steering Board comprised of partners from BCC, the CIO, Historic England, National Trust and the World Monuments Fund. The Steering Board will be chaired by the Project Sponsor from either Birmingham City Council or the MRB CIO, as agreed.

Members of the Board are indicated in the below figures.



Reporting to the Steering Board will be:

- Project Director (to be appointed)
- Project Manager (to be appointed)
- Finance representatives

The representatives above will provide progress updates to the Steering Board from the project team/working groups. The Project Director/Manager will report to the Steering Board on progress in relation to the project brief, raise any significant issues or risks, seek decisions at key points in the project and support and coordinate the group.

Meetings will be held at key junctures in the project development to ensure timely and adequate decision-making to steer and progress work, or to address significant issues, risks or opportunities.

Project delivery

Development and delivery of the project will be overseen and coordinated via a Project Team, led by a Project Director. This role will be crucial in integrating the capital development with operational activity/delivery, as well as leading workstreams to build the business plan, develop the funding strategy, establish long term legal/governance arrangements and evaluate impact. Delivery of the project will be done via workstreams.

The Project Director/ Manager’s responsibilities will include:

- Agree the project goals, objectives and deliverables with the Sponsor
- Agree how the project will be run and manage the process in order to deliver the project brief;
- Form and manage the project team;
- Manage stakeholders and set up the appropriate governance bodies for the project;
- Liaise regularly with the Sponsor and Client and advise the Sponsor and Client when the Project is diverging from the agreed scope;
- Identify critical risks and issues which require the direct influence of the Sponsor and/or Client to resolve;
- Monitor the project resources including third parties, specialists, volunteers etc where involved;
- Ensure compliance to legal requirements and partner organisation rules.

The Project Team will comprise a multi-disciplinary, cross-organisation group of skilled staff. It may include staff and volunteers from partner organisations as well as external consultants/contractors. This collaboration provides valuable expertise to the project, plays an assurance role and gives access to a wide range of supporters and stakeholders

Meetings will be held on a monthly basis to ensure timely and adequate decision-making to steer and progress work, or to address significant issues, risks or opportunities.

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

Yes

No

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

Yes

No

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

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

The strategy, framework and plan for dealing with the management of risk are set out in Birmingham City Council's Risk Management Policy, Strategy and Methodology. The risk management process has five key stages to it:

1. Risk / Opportunity Identification;
2. Risk / Opportunity Analysis;

3. Risk / Opportunity Prioritisation;
4. Management of Risks / Opportunities; and
5. Monitoring of Progress and Reviewing Risk Registers.

The Project Manager, with support from the project team, including specialist support, contractors and statutory undertakers, will lead the risk assessment process.

With respect to construction health and safety there is a legal requirement to comply with the Construction (Design and Management) Regulation 2015.

A Risk Management Assessment (Risk Register) has been completed and can be found in a separate document issued with this application.

- 6.3f Has a risk register been appended to your bid? Yes
 No

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

Birmingham City Council has significant experience of developing and delivering regeneration and remediation projects across the city including the renovation of listed buildings within its ownership. The Sports Service has recently directly delivered a £40m leisure transformation programme including both new builds and refurbishments to existing pools within its portfolio of assets.

On completion, this programme has been used as an example of good practice and case study by Sport England for other local authorities and developers to follow. The Sports Service is currently delivering amongst other capital developments the redevelopment of Alexander Stadium in order to host the Commonwealth Games in 2022. This project, at a capital cost of £74m remains on budget and on programme for completion in April 2022.

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)

This application is subject to the approval of an Outline Business Case and Full Business Case in the near future by the Council's Acting Director, Inclusive Growth, Managing Director – City Operations and Director of Council Management (Interim) in accordance with the Cabinet decision of 8th June 2021. The OBC/FBC will identify the following: financial implications (both during delivery and ongoing), legal implications, procurement (including the Council's Social Responsibility requirements), equality implications, benefits, risk management and policy compliance. Ongoing project delivery is subject to individual service project boards and where the total value of the scheme is £20m+ then the Council has a separate

Capital Board to rigorously monitor performance, track changes and ensure successful delivery. In addition, all expenditure will comply with the City Council financial regulations and standing orders in relation to public procurement regulations and obtaining value for money, recording financial transactions and grant claims which are subject to scrutiny by the Council's internal and external auditors.

6.4 Monitoring and Evaluation

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

6.4 a 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

Monitoring and Evaluation will be undertaken during the development and delivery stages of the project as well as post-implementation, to map the success of the project against the project aims. This will be done by measuring benefits/outcomes from pre-defined baselines to determine the scale of the success of the project.

M&E objectives

The objectives of the monitoring and evaluation are to map the success of the project against the scheme objectives. The strategic objectives for MRB are outlined below:

1. MRB will be a thriving leisure, learning and cultural destination that provides services that local people need and an offer that appeals to the wider city, and visitor from across the UK and the world.
2. MRB will be a resilient, entrepreneurial and sustainable local enterprise that supports the local economy and improves the wider area / provides a catalyst for regeneration.
3. MRB is a long-standing landmark which builds pride in Balsall Heath; a *model* for productive and sustainable restoration of one of Birmingham's internationally significant heritage icons.
4. MRB will contribute to making Balsall Heath a cohesive and resilient community and a better place to live and work.
5. Local people can make positive changes for others and Balsall Heath, they are represented and invested in MRB.

Outline of M&E approach:

The scheme delivery process and timetable will be monitored against the project programme. Key milestones and deliverables will be used to track progress, identifying key issues and reasons for variance from plan.

The scheme cost monitoring will address the following and is detailed in the table below:

- Outturn investment costs broken down into elements in a similar form as for the Major Scheme funding bid; Analysis of risk manifestation in the elements of investment costs;
- Identification of cost elements with savings and identification of the reasons for cost savings;
- Analysis of cost elements with overruns and identification of the reasons for cost overruns;
- Outturn operating costs; including evidence of differences between outturn and forecasts and identification of any reasons for the differences, and
- Outturn maintenance or other capital costs compared with forecasts and any unanticipated costs identified and cause.

Outcomes:

During the development phase of the MRB project, an evaluation framework will be designed and implemented to capture the changes and impacts experienced over the duration of the project. The purpose of this is to demonstrate how the strategic aims of the project have been evaluated. The framework will consist of a series of success measurements created with Birmingham City Council, MRB CIO and the wider coalition, to track change and progress throughout the project.

The baseline (pre-construction) data collection requirements will also be established within the development phase in particular for activity pilots, business planning and governance/ capacity building work. Building on this, an evaluation plan for the project delivery phase of the scheme will be developed along with an 'End of Development Phase' report which will provide recommendations for ongoing work.

During the delivery phase of the project, annual learning events will be held over the course of the project to exchange learning during delivery and reflect on evaluation findings and progress actions to improve ongoing delivery. Interim reports will be produced evidencing the performance of the project and progress towards outcome delivery.

A report will be produced demonstrating the impact of the scheme one year following the end of capital works. Project activity will be tracked and data will be collected to support evaluation. This will include attendance records of participants, visitors and volunteers; focus groups exploring specific issues with target audiences, staff, trainees and volunteers; surveys of public events and general

visitor experience; participatory evaluation activities with the general public; observations at workshop sessions and events. Ongoing interviews, conversations, contact with project staff, partners, participants, visitors and stakeholders to track progress and change, including exit interviews for any key personnel leaving the project will also be conducted. This data will be used to identify changes in the success measurements between the baseline and one year post opening monitoring.

Key metrics for M&E

The monitoring and evaluation of the scheme will address the following key metrics, informed by the strategic objectives:

- Service/facility use
- Cultural, leisure and heritage provision
- Visitor experience
- Health and wellbeing
- Economic benefit
- Building restoration/ productive reuse
- Environmental sustainability
- Public benefit

Inputs, outputs, outcomes and impacts are summarised in Appendix F within the appended excel spreadsheets.

Resourcing Plan

A Project Evaluator will be appointed during the development phase for the full term of the project, including both the Development stage and Delivery stage.

- Development Stage: Baselineing the project, initial research, development of the full brief - £10,000
- Delivery Stage: Benchmarking against other projects, demonstration of project impact and process of change. - £85,000 (includes expenses)

The estimated total cost for undertaking the above monitoring and evaluation activities is estimated to be £95,000. These costs are indicative and should be further refined prior to commencement of works. The figures are budgeted within the scheme costs.

PART 7 DECLARATIONS

7.1 Senior Responsible Owner Declaration

As Senior Responsible Owner for Moseley Road Baths I hereby submit this request for approval to UKG on behalf of Birmingham City Council and confirm that I have the necessary authority to do so.

I confirm that Birmingham City 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: CHRIS JORDAN

Signed:



7.2 Chief Finance Officer Declaration

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

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

Name: REBECCA HEL LARD

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 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?	Y	Letter has been appended. Appendix G
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	Local Authority have responsibility for delivery
Part 4.3 The Case for Investment		
For Transport Bids: Have you provided an Option Assessment Report (OAR)	N/A	Not applicable as not Transport Bid
Part 6.1 Financial		
Have you appended copies of confirmed match funding?	Y	
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.	N/A	
Have you appended a letter to support this case?		
Part 6.3 Management		
Has a delivery plan been appended to your bid?	Y	Delivery plan Appendix E
Has a letter relating to land acquisition been appended?	N	Not required
Have you attached a copy of your Risk Register?	Y	Risk Register Appendix D
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.		

Questions	Y/N	Comments
Part 1 Gateway Criteria		
<p>You have attached two years of audited accounts</p> <p>You have provided evidence of the delivery team having experience of delivering two capital projects of similar size and in the last five years</p>		
Part 4.2 Stakeholder Engagement and Support		
<p>For transport bids, have you appended a letter of support from the relevant district council</p>		
Part 6.1 Financial		
<p>Have you appended copies of confirmed match funding</p> <p>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.</p>		
Part 6.3 Management		
<p>Has a delivery plan been appended to your bid?</p> <p>Has a letter relating to land acquisition been appended?</p>		
<p>Have you attached a copy of your Risk Register?</p>		
Annex A-C - Project description Summary (only required for package bid)		
<p>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.</p>		

Appendix A. 'Diving In' Project Overview

Appendix B. Logic Map

Appendix C. World Monuments Fund Letter of Support

Appendix D. Project Risk Register

Appendix E. Project Delivery Programme

Appendix F. LUF Application Form Tables

Appendix G. MP Support Letter

Appendix H. Mayoral Support Letter