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# High Street Heritage Action Zone (HSHAZ) Evaluation

Case Study Appendix: Wakefield




Historic England

# HSHAZ Evaluation

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## Purpose of the case study

**This case study is not an evaluation of the Wakefield HSHAZ scheme. The purpose of the case studies as a whole is to provide insights to inform the overall HSHAZ programme evaluation.**

This case study appendix reviews the outputs achieved through the HSHAZ scheme against its stated targets and assesses likely value for money using government compliant methodologies. The review is based on:

- the monitoring data collected by project teams within submitted scheme plans;
- a facilitated discussion with the local project team and HSHAZ Project Officers using an agreed consultation guide to review successes, challenges and lessons learned;
- a site visit; and
- the expression of interest submission.

# 1 Strategic context

## 1.1 Context and need for investment

The Wakefield HSHAZ scheme was allocated £1,900,000 of funding from Historic England for the capital strand and £90,000 of funding from Historic England for the cultural strand. The capital strand was expected to generate £1,900,000 match funding from Wakefield Council and £500,000 of match-funding from other sources. The cultural strand was expected to generate £20,000 of match-funding from other sources<sup>1</sup>.

The Wakefield High Street Heritage Action Zone (HSHAZ) scheme is located on the Upper Westgate High Street, which acts as a gateway to Wakefield town centre and boasts some of its most historic buildings including the Grade II\* listed Theatre Royal.

High streets across the UK face similar challenges. Competition from online shopping and retail parks, rising vacancy rates, and the negative consequences of deprivation (such as homelessness and crime) were widely recognised as contributing factors to the difficulties experienced by high street communities and businesses. These macro trends are complemented by local trends. Within Wakefield, the need to maintain and improve some of its 18th and 19th century buildings to bring them back into productive use were identified as key drivers for the project<sup>2</sup>. Additional local issues identified at the outset of the scheme included tired public realm and a perception of the nighttime economy in the HSHAZ area which distracts from its historical importance and presence.

## 1.2 HSHAZ scheme objectives

The original objectives of the HSHAZ (as detailed in the Expression of Interest) were to:

- Address the quality of the building facades and reinstate the heritage appeal;
- Work with building owners and tenants to stop the decline of the historic townscape and address issues of disrepair;
- Introduce a grant scheme to allow businesses the opportunity for financial support and to ensure improvements are of high quality and meet the conservation area requirements.
- Deliver improvements to public realm, such as gateways and historical yards, including enhancing lighting, surface materials, street furniture and signage.

Overall, the Wakefield HSHAZ's thematic objective was to **create an attractive city space and improve local and visitor perceptions to raise the profile of heritage**, making Wakefield a place people want to visit, work and live.

## 1.3 Strategic alignment

<sup>1</sup> These allocations are from the first available scheme plans (Y1Q4 for the capital strand and Y3Q4 for the cultural strand)

<sup>2</sup> Wakefield HSHAZ Expression of Interest 2019

Wakefield's vision is to establish itself as a leading second-tier city, focusing on attracting investment and tourism to boost its local economy. A key part of this plan is the redevelopment of the city centre, with the “Heart of Wakefield” project playing a major role in revitalizing the main retail area. The Westgate HSHAZ intervention will complement this project through preserving and enhancing the city's historic areas. By leveraging its cultural and heritage assets, Wakefield aims to create a more vibrant and appealing city centre, making it a distinctive destination for visitors and investors alike.

The alignment of the HSHAZ with key policies is presented in further detail in the table below.

Table 1-1: Wakefield HSHAZ – Alignment with strategic priorities		
Policy/Strategy	Objective/Description	Alignment
Wakefield Masterplan 2022	The Wakefield Masterplan addresses issues of decline in the retail and business sectors within the city centre, creating a positive reputation for the city as a desirable place to live, work and play. The Masterplan highlights the need to redefine Wakefield's city centre as a focal point for heritage, culture and creativity, making heritage, historic character and culture accessible to residents and visitors, stimulating regeneration in the city centre. Some of the challenges identified in this Masterplan include vacant retail properties, outdated retail uses, limited public open space, limited residential offer, lack of cultural organisations in the city centre, disconnection of pedestrian links and limited street greening.	The Upper Westgate Heritage Action Zone scheme is well aligned with other initiatives in Wakefield city centre and the objectives of Wakefield's wider masterplan.
Wakefield Council Corporate Plan 2022-2024	The Wakefield Council Corporate Plan 2022-2024 focuses on supporting local communities by growing businesses and jobs. Key priorities include creating safe, welcoming neighbourhoods, fostering an inclusive economy, improving health, supporting families, and promoting sustainability. It aims to revitalize towns, villages, and high streets through investment, ensuring they meet community needs with cultural and leisure opportunities.	The objectives of the HSHAZ programme are aligned with those of Wakefield's Corporate Plan.
Wakefield District Economic Wellbeing Strategy 2024-2029	Wakefield's vision prioritizes improving the wellbeing of its people and communities, offering a strategy that guides the Council and its partners toward building a wellbeing economy. The strategy focuses on three core ambitions: <ul style="list-style-type: none"> <li>• Ensure a transition for Wakefield's carbon-intensive businesses while preparing key industries for the future. This includes promoting community-led economic development and integrating local programmes into the broader Wakefield vision</li> <li>• Create high-quality, rewarding jobs for the growing population, with a focus on the creative industries, which are expected to be a major employment driver and key to telling Wakefield's story.</li> <li>• Encourage more Wakefield businesses to reinvest locally, connect residents to quality jobs, and stimulate regeneration across the region.</li> </ul>	The Westgate Street HSHAZ will create employment and business opportunities from bringing vacant space back into use, as well as a programme of cultural support to initiate growth in the creative sectors.



Complementary Funding	<p><u>Levelling Up Fund</u> In 2023, Wakefield received £20,000,000 from the Levelling Up Fund to support two important developments in the heart of Wakefield.</p> <ul style="list-style-type: none"> <li>• Renovate and repurpose the former British Home Stores site. Funding will transform the derelict site which will become a new city museum and library, complementing nearby Town Deal projects to deliver the Wakefield City Council Masterplan.</li> <li>• Deliver the second phase of the Tileyard North creative industries hub at Rutland Mills. Funding will refurbish and renovate the mill buildings to deliver a 12,500 sq m (135,000 sq ft) hub for creative industries to flourish, cementing the area as a distinctive cultural quarter for residents and visitors.</li> </ul> <p><u>Towns Fund</u> The Council secured £24,100,000 from the Government's Towns Fund to support a series of projects in Wakefield, rediscovering Wakefield as a regional centre for creative industries. Activities and actions will include building upon the city's arts and cultural heritage to attract new businesses and employment opportunities, create new skills training opportunities, deliver high quality environments for residents and visitors to enjoy.</p>	Existing funds in Wakefield are complementary to one another and support Wakefield's wider regeneration vision.
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## 1.4 Activities

### 1.4.1 Capital strand

The focus of the capital investment was to restore 12 buildings<sup>3</sup> through external works and one building for internal works for conversion to residential. Alongside this, a series of public realm improvements were planned for Carter Street, Cheapside, Thompsons Yard, Woolpacks Yard, and part of Barstow Square. The individual projects have been set out as follow:

- **Project 1: External Works** – shopfront improvements and external works to priority buildings alongside Westgate and Silver Street
- **Project 2: Internal Works** – delivery of internal alternation to bring two empty shop units back into use as residential
- **Project 3: Small 30k Grants Schemes** – six grants to buildings to repair historic hoists and 8x30k schemes to deliver conservative repairs to other buildings on the high street and to offer additional training opportunities
- **Project 4: Public Realm Schemes** – five public realm schemes to reinstate historic setting and lighting to the yards and alleyways off Westgate, with apprenticeship opportunities being offered within the scope of the activities

<sup>3</sup> The overall buildings identified for either external or internal works were: 50 – 52 Westgate Street, 111-113 Westgate, 115 Westgate, 115a & b Westgate, 65 Westgate, 6-8 Silver Street, 82-86 Westgate, 109 Westgate, 18-20 Silver Street, 70 Westgate, 80 Westgate

- **Project 5: Revenue Costs** – to support community and cultural engagement activities
- **Project 6: Revenue Capacity Building** – a series of workshops, sessions, and guided walks on historic building maintenance and custodianship of heritage assets awareness
- **Project 7: Capital Staff** – HAZ Project Officer to deliver the schemes
- **Project 8: Purchase of Pemberton House** – as an addition to the original project delivery plan, it was agreed that the purchase of Pemberton House would be included in the scheme, as it is a key building within the conservation area that had become available to purchase

The forecast expenditure of the capital strand over the four-year programme is set out below.

Table 1-2: Capital Strand Forecast Expenditure					
	2020/21	2021/22	2022/23	2023/24	Total
Historic England grant	£114,148	£1,021,074	£555,149	£209,669	<b>£1,900,040</b>
Local authority funding	£ 114,148	£1,021,074	£555,149	£209,669	<b>£1,900,040</b>
Other matched funding	£0	£305,444	£148,560	£50,132	<b>£504,136</b>
<b>Total</b>	<b>£228,296</b>	<b>£2,347,592</b>	<b>£1,258,858</b>	<b>£469,470</b>	<b>£4,304,216</b>

*Note: Forecast expenditure is from the Y1Q4 scheme plan, which is the first record of the forecasted costs.*

#### 1.4.2 Cultural Activities

The key activities are set out below, aimed at unlocking the city’s creative potential, celebrating its heritage, and fostering an inclusive environment for residents and visitors:

- **Project 1:** Self-guided trail in which commissioned artists combined architectural photography, historical research, and audio design to create content relating to the ‘Westgate Rising’ self-guided trail route, which was uploaded to the Love Exploring app. A physical map was also made available to visitors.
- **Project 2:** Bespoke artistic street decorations where The Westgate HAZ Cultural Consortium supported artists with research and connections to important services. Installations included window vinyl and aluminium panels with focus on the area’s textile heritage.
- **Project 3:** Visual art interventions delivered at seven buildings, informed by drop-in sessions from residents to provide creative inspiration.
- **Project 4:** Freelance producer role, development of a range of creative commissions and supported the Westgate Cultural Consortium.
- **Project 5:** Live performances of characters and stories of Westgate with key characters animating spaces including yards alongside the Greening activity
- **Project 6:** Westgate Greening, a group of volunteers delivered ‘greening’ activities including planting, community workshops, seed exchanges, and public realm improvements.
- **Project 7:** a programme of events focussing on Westgate’s musical heritage with a film maker appointed to create a film-based piece capturing heritage and current music activity in the area, which was showcased at the new “Wakefield Live” festival.

- **Project 8:** Summer Festival Activity with a live animation of Upper Westgate during the 2022 summer festival including heritage themes activities, public workshops and sharing of stories
- **Project 9:** WordFest-Hidden Stories of Westgate with a range of creative, word-based activity to embed Westgate as a key element of the Council Libraries service led festival
- **Project 10:** Lantern Parade led by the community as part of Light Up, the Council’s festival of light, and instating an annual event
- **Project 11:** Community Opera and a large-scale live performance in the historic streets and buildings of Westgate.

There was no forecasted expenditure for the cultural strand from the early stages of the programme. The first scheme plan made available was in the last quarter of 2022/23. This forecast expenditure is presented in the below table.

Table 1-3: Cultural Strand Forecast Expenditure					
	2020/21	2021/22	2022/23	2023/24	Total
Historic England Grant	£0	£14,812	£24,094	£51,094	<b>£90,000</b>
Local authority funding	£0	£0	£0	£0	<b>£0</b>
Other matched funding	£0	£3,000	£2,750	£10,000	<b>£15,750</b>
<b>Total</b>	<b>£0</b>	<b>£17,812</b>	<b>£26,844</b>	<b>£61,094</b>	<b>£105,750</b>

*Note: Forecast expenditure is from the Y3Q4 scheme plan, which is the first record of the forecasted costs. The evaluation of the scheme would be enhanced by accurate forecasts from the start of the programme.*



## 2 Project delivery and management

The HSHAZ was delivered by Wakefield Metropolitan District Council which was primarily a team of three people including:

- HAZ Project Manager
- Funding Support Officer
- Strategic Planning Officer

Support was provided from wider Council teams including highways, planning and finance. It should be noted that initial buy-in internally was difficult, as the HSHAZ was not given the appropriate priority position given ongoing challenges related to the pandemic, other funding as well as the complexity of the works and the necessary stakeholder engagement.

The HE team supporting the delivery of Wakefield HSHAZ included a Project Officer, a Project Lead and a Senior Responsible Officer. This team recognised the Wakefield HSHAZ team for their effective management and adherence to the original programme design as well as mitigating potential risks and factors. Wakefield was also active in implementing HSHAZ and HE branding to promote the programme.

The Cultural Strand of the work was coordinated by the Council’s Culture Team and led by the Wakefield Cultural Consortium which is a group of multi-disciplinary leaders from civic, community and creative organisations (chaired by Cllr Lynn Masterman, Wakefield’s heritage champion) who met bi-monthly and reduced to quarterly to act as a steering and advisory group for the creative commissions and cultural programme. The Cultural Consortium members were as follows:

Table 2-1: Wakefield HSHAZ – Cultural Consortium members		
Wakefield Council	The Art House	Wakefield Historic Society
West Yorkshire Archive Service	The Art Walk	Wakefield Civic Society
Theatre Royal Wakefield	The Gissing Trust	Yorkshire Mesmac
Long Division Festival	Dreamtime Creative	Westgate Art Studios
One to One Development Trust	CAPA College	Next Generation Youth and Community

In the third year of delivery, dissolution of the Cultural Consortium saw a reduction in cultural activities and engagement. This was the result of overlapping events and reduced officer capacity.

The overall HSHAZ process was overseen by an established Westgate HSHAZ Grants Board, chaired by an elected member, which considered grant applications from building owners and leaseholders.

## 3 Project progress

### 3.1 Overview

This section assesses the Wakefield HSHAZ against its stated costs, outputs, and objectives.

As set out in Section 1, the earliest capital scheme plan was in Y1Q4, and the earliest cultural scheme plan was in Y3Q4. The target costs and outputs have changed over time due to change requests. The final scheme plans typically suggest that the programme was delivered exactly on budget for every project with the exact level of forecast outputs delivered.

To allow a comparison against the envisaged targets at the start of the HSHAZ programme, our assessment focusses on the delivered outputs and outturn costs against the targets from the earliest available information. Therefore, the original target figures for capital strand are Y1Q4 and cultural strand are Y3Q4.

### 3.2 Capital strand

The Wakefield HSHAZ Capital Strand invested £4,118,000 in the various projects, compared to a forecasted spend of £4,304,000 with the additional funds coming from other match funding.

Table 3-1: Wakefield HSHAZ Capital Strand – annual spend performance					
	20/21	21/22	22/23	23/24	Total
<b>Forecast Expenditure</b>					
Historic England grant	£114,148	£1,021,074	£555,149	£209,669	£1,900,040
Local authority funding	£114,148	£1,021,074	£555,149	£209,669	£1,900,040
Other matched funding	£0	£305,444	£148,560	£50,132	£504,136
<b>Total forecast spend</b>	<b>£228,296</b>	<b>£2,347,592</b>	<b>£1,258,858</b>	<b>£469,470</b>	<b>£4,304,216</b>
<b>Outturn Expenditure</b>					
Historic England grant	£114,147	£1,021,022	£555,149	£227,031	£1,917,348
Local authority funding	£114,147	£43,004	£1,702,668	£40,124	£1,899,942
Other matched funding	£0	£23,555	£256,079	£20,665	£300,300
<b>Outturn capital spend</b>	<b>£228,294</b>	<b>£1,087,581</b>	<b>£2,513,896</b>	<b>£287,820</b>	<b>£4,117,590</b>

Of the Historic England investment, £347,000 was reallocated from other projects to cover the additional Pemberton House purchase, which was not originally identified as a project.

Table 3-2: Wakefield HSHAZ Capital Strand – Spend performance by project				
	Outturn expenditure	Forecast as of Y1Q4	% of forecast target (RAG)	% of new target
Project 1 Exterior building works	£711,743	£923,500	77	100
Project 2 Interior building works	£33,621	£311,978	11	100
Project 3 Small grants schemes	£76,028	£141,750	54	100
Project 4 Public realm schemes	£467,717	£292,539	160	100
Project 5 Community and cultural	£32,299	£31,722	102	100

Project 6 Capacity building	£73,388	£53,988	136	100
Project 7 Staff and professional	£175,952	£144,563	122	100
Project 8 Pemberton House	£346,500	-	-	100
<b>HE Grant</b>	<b>£1,917,348</b>	<b>£1,900,040</b>	<b>101</b>	<b>100</b>
<i>LA Funding</i>	<i>£1,899,942</i>	<i>£1,900,040</i>	<i>100</i>	<i>100</i>
<i>Other match funding</i>	<i>£300,300</i>	<i>£504,136</i>	<i>60</i>	<i>100</i>
<b>Total</b>	<b>£4,117,590</b>	<b>£4,304,216</b>	<b>96</b>	<b>100</b>

Note: Assessment status is green for <=100%, 100%<amber>=110% and red for >110%

The internal works project (despite underspend) and purchase of Pemberton House have **successfully brought over 2,200 square metres of vacant commercial floorspace into use and created three new residential units**. Both these outputs greatly outperformed the original targets. Given the importance of bringing vacant floorspace into use and delivering housing units to revitalise the high street, this performance is a real success for the local area and the HSHAZ team.

The external works, however, were only partially successful with nine of out the targeted 12 building shopfronts restored or reinstated. Additionally, 19 of the historic buildings or assets were conserved compared to a target of 21. The project team found that business owners were less willing than expected to partake in the shopfront improvement scheme, which was worsened due to the Covid-19 pandemic and the difficult socio-economic environment. This situation particularly prevented night-time economy businesses from investing or partaking in the programme. Additionally, the increase in the cost of materials meant a rise in the total project costs and this limited the number of projects which could be completed.

The HSHAZ also did not meet its original target in relation to the number of public events and activities, which were designed to gain community buy-in and promote the schemes. These types of events were particularly difficult to deliver due to Covid-19 restrictions and therefore, an element of the reduced outputs is understandable.

<b>Table 3-3: Wakefield HSHAZ Cultural Strand – Output performance</b>				
	<b>Achieved outputs</b>	<b>Forecast as of Y1Q4</b>	<b>% of forecast target (RAG)</b>	<b>% of new target</b>
Number of historic building or heritage asset repaired/conserved	19	21	90	100
Number of historic shopfronts restored or reinstated	9	12	75	100
Public realm area improved (sqm)	542	574	94	99
Vacant / underused commercial floor space brought back into use (sqm)	2210	400	553	100
New residential unit created	3	0	-	100
Amended scheduling	9	0	-	60
Number of new list entries	1	0	-	20
Number of guides/trails	37	19	195	100
Number of boards/displays	3	4	75	100
Number of heritage/archaeological research studies	26	1	2,600	100
Number of new or revised historic area assessments/conservation area proposals	1	1	100	100
Number of supplementary planning or design guidance	1	1	100	100
Number of engagement events/activities (including online)	39	21	186	98
Number of public events/activities (e.g. open day)	8	16	50	100
Number of school educational events/activities	2	3	67	67
Number of apprenticeship schemes	5	0	-	100
Number of construction training activities	5	4	125	100
Number of other professional training activities	1	1	100	100
Number of training sessions provided to volunteers	3	2	150	100

Note: Assessment status is green for <=100%, amber for 65-100%, and red for <65%

### 3.3 Cultural strand

As stated above, the evaluation of the cultural strand performance is made difficult by a lack of information in terms of original targets and expected spend.

The overall spend for the cultural strand was in line with the HE allocation but was slightly under the forecast expenditure for match-funding. The community opera project underspent by nearly £5,000, whilst four projects marginally overspent compared to their target.

<b>Table 3-4: Wakefield HSHAZ Cultural Strand – Spend performance</b>			
	<b>Outturn expenditure</b>	<b>Forecast as of Y3Q4</b>	<b>% of forecast target (RAG)</b>
<b>Cultural strand</b>			
Project 1: Self-guided trail	£3,500	£3,500	100
Project 2: Bespoke artistic street decorations	£3,850	£3,500	110
Project 3: Visual art interventions	£5,000	£5,000	100
Project 4: Cultural programme producer role	£23,721	£19,500	122
Project 5: Live performances	£2,500	£1,250	200
Project 6: Westgate Greening	£6,014	£7,250	83
Project 7: Westgate's Musical Heritage	£4,800	£5,000	96
Project 8: Summer Festival Activity	£4,500	£5,000	90
Project 9: WordFest – Hidden Stories of Westgate	£0	£0	-
Project 10: Lantern Parade	£10,550	£10,000	106
Project 11: Community Opera	£25,565	£30,000	85
<b>HE Grant</b>	<b>£90,000</b>	<b>£90,000</b>	<b>100</b>
<i>LA Funding</i>	-	-	-
<i>Other match funding</i>	£5,871	£15,750	37
<b>Total</b>	<b>£95,871</b>	<b>£105,750</b>	<b>91</b>

Note: Assessment status is green for <=100%, 100%<amber>=110% and red for >110%

Overall, the output targets for the cultural strand were exceeded, except in relation to town guides/heritage trails where 4 rather than 5 were delivered. In particular, 83 artworks were delivered (compared to a target of 12), 8 consultation events were hosted, and 8 interpretation boards were implemented. Neither consultation events nor interpretation boards were an initial target for delivery. Of note to the local community, there were 107 artist days in residence, providing an opportunity for local people to learn, socialise and develop.

<b>Table 3-5: Wakefield HSHAZ Cultural Strand – Output performance</b>			
	<b>Achieved outputs</b>	<b>Forecast as of Y3Q4</b>	<b>% of forecast target (RAG)</b>
<b>Cultural Strand</b>			
Number of artworks/installations	83	12	692
Number of artist days in residence	107	5	2,140
Number of exhibition open days	14	2	700
Number of interpretation boards/displays	8	0	-
Number of town guides/heritage trails	4	5	80
Number of consultation events/activities	8	0	-
Number of engagement events/activities	21	13	162
Number of public events/activities	2	0	-
Number of school education events/activities	4	0	-

Note: Assessment status is green for <=100%, amber for 65-100%, and red for <65%

## 4 Value for money

A value for money assessment has been undertaken in line with HM Treasury Green Book, Ministry of Housing, Communities and Local Government (MHCLG) Appraisal Guide, and relevant departmental guidance such as the Department for Culture, Media and Sport (DCMS) Capital and Heritage Framework. As set out within the MHCLG Appraisal Guide, projects should be appraised based on a **Benefit Cost Ratio (BCR)**<sup>4</sup>.

Monetised costs and benefits from over the HSHAZ programme have been converted to 2024/25 prices using the Gross Domestic Product (GDP) deflators. As all benefits and costs have been inserted in Year 0 with appropriate 2024/25 values applied, there is no discounting required in the analysis. The economic cost calculations are based on the public sector investment, with private sector investment accounted for in the land value uplift calculations. Zero optimism bias has been applied as the costs are known and have been expended. Additionally, no optimism bias has been applied to the benefits as the analysis is based on actual outputs. However, the uncertainty in any values is explained.

The following benefits have been monetised, with 71.5% additionality applied based on guidance for regeneration through capital projects and image/culture:

- **Land value uplift (capital strand):** Land value uplift (LVU) is MHCLG's preferred approach to valuing the benefits of development. It is the difference between the new value – (after investment) – and its previous value. MHCLG's land value estimates for policy appraisal have been applied to the land brought back into use for residential or commercial uses.
- **Amenity (capital strand):** Consistent with the MHCLG Appraisal Guide, new open spaces in an urban environment have an economic benefit of £128,658 per hectare per annum (2024/25 prices). It has been assumed that 10% of the public realm delivered as part of the programme are new open spaces. In line with recent appraisals, 50% of per hectare value (£64,329) has been applied to remainder of the public realm which relates to improvements of existing spaces.
- **Labour supply (capital and cultural strand):** The employment generated by the floorspace brought back into use within the capital strand has been calculated using industry-standard employment densities. The artists into residence in the cultural strand have been converted into Full-Time Equivalent jobs based on the number of days supported. The number of jobs created have been calculated using employment densities and in line with MHCLG guidance, a local GVA per worker figure is applied to the jobs taken up by new entrants. In line with guidance, it is assumed 10% of jobs will be occupied by new entrants and there will be a 40% welfare impact for these jobs with the benefit experienced across five years.
- **Wellbeing benefits from new employment (capital and cultural strand):** Investment is likely to generate permanent employment opportunities onsite, which are known to have a positive impact on individuals' wellbeing when moving from unemployment into employment. Values from Green Book's Supplementary Wellbeing Guidance have been applied to the new entrants.

<sup>4</sup> The BCR can be interpreted as the estimated level of benefit per £1 of cost. It is used as the core element in the measure of Value for Money (VfM) when interventions involve a net cost to the public sector.



- **Cultural use (capital and cultural strand):** As set out in the Culture and Heritage Capital Evidence Bank, which is cited in the Green Book Wellbeing Guidance, these benefits relate to the willingness to pay of local residents to attend cultural events and assets. This value has been applied to the attendees to engagement and cultural activities, as well as forecasted attendees to artworks/installations.
- **Heritage use and non-use – historic buildings conserved (capital strand):** Use and non-use benefits from the historic buildings or heritage assets conserved have been estimated using benefit transfer approaches from the DCMS Cultural and Heritage Capital Evidence Bank. ‘The Economic Value of Heritage: A Benefit Transfer Study’ considered use and non-use values from works to improve the maintenance and conservation of historic buildings in various cities, a similar initiative to the historic building conservation works in the HSHAZ programme. We have applied the use value to the estimated footfall in each HSHAZ from the mobile phone data and the non-use value to residents in the local authority (minus the users).
- **Heritage use and non-use – shopfront improvements (capital strand):** The restoration and improvement of historic high street shopfronts is a key component of the capital element of the HSHAZ programme. This aspect of the programme cannot be accurately valued using a benefits transfer approach in which the use and non-use economic benefit findings of an existing similar study, for example from the DCMS Evidence Bank, would be applied. For this reason, AMION has undertaken a bespoke contingent valuation and benefits transfer study to assess the use and non-use economic benefits attributed to the restoration and improvement of historic high street shopfronts delivered across England through the HSHAZ programme. We have applied the use value to the estimated footfall in each HSHAZ from the mobile phone data and the non-use value to residents in the local authority (minus the users).
- **Wellbeing benefits from volunteering (capital and cultural strand):** As set out in the Green Book Supplementary Guidance for Wellbeing, volunteering is associated with enhanced wellbeing, with the value estimated using the subjective wellbeing valuation approach cited in this government guidance. The core from the Wellbeing guidance has been applied to the volunteer hours.
- **Wellbeing benefits from education and social programmes (capital and cultural strand):** The Green Book Supplementary Guidance for Wellbeing shows that life satisfaction improves based on participation in education and social development programmes. The core value from the Wellbeing guidance has been applied to attendees at education and training events.
- **Wage premium benefits from education completions (capital strand):** The programme has led to apprenticeship opportunities throughout the construction phase and other construction training events. There is a wealth of existing evidence showing the positive impact of training and qualifications on employment and earnings. Wage premium effects from previous Department for Business, Innovation, and Skills research has been applied to the number of apprenticeship and training completions in the programme, with the benefit lasting for three years which is a cautious approach.

**Active mode (capital strand)<sup>5</sup>:** The interpretation boards and digital displays will deliver wayfinding benefits for residents and visitors which can be measured using Department for Transport guidance. The benefits arising from these improvements have been measured using the DfT Active Mode Appraisal Toolkit over a 30-year appraisal period. The visitors to the enhanced area have been calculated using mobile phone footfall data.

- **Strategy development (capital strand):** There has been substantial resource allocated to the wide range of feasibility, research, heritage and conservation management studies. Our assessment has assumed that future development studies are likely to at least deliver benefits in line with their costs, given that they have been led by local partners in line with need.
- **Distributional benefits (capital and cultural strand):** The approach used to calculate distributional effects is that set out in the HM Treasury Green Book, based on equivalised disposable household income and welfare weights (the estimate of the marginal utility of income). The Green Book distributional weighting framework is constructed using data from the DWP Households Below Average Income (HBAI) dataset. For Wakefield, there is a distributional weight of 1.2:1.

The monetised benefits from the capital and cultural strand are shown below. The main capital strand benefits arise from land value uplift and labour supply benefits from the commercial floorspace brought back into use, the heritage benefits from historic buildings conserved and the shopfront improvements, and the education wage premium benefits from the construction training activities. The cultural strand benefits arise from attendees to events delivered during the HSHAZ programme and the forecasted increase in visitors to the 83 artworks/installations.

	<b>Capital strand</b>	<b>Cultural strand</b>	<b>Total Wakefield HSHAZ</b>
Land value uplift	£2,404	-	£2,404
Amenity	£43	-	£43
Labour supply	£818	£3	£821
Wellbeing from employment	£54	£1	£55
Heritage Use	£878	-	£878
Heritage Non-Use	£993	-	£993
Cultural use	£4	£130	£134
Education wage premium	£673	-	£673
Wellbeing from education	£2	£1	£3
Wellbeing from volunteering	£22	£8	£30
Active mode	£156	-	£156
Strategy development	£543	-	£543
Distributional analysis	£1,248	£26	£1,274
<b>Total benefits</b>	<b>£7,841</b>	<b>£169</b>	<b>£8,010</b>

<sup>5</sup> The active mode benefits have been monetised for the capital strand based on the delivery of enhanced public realm and permanent installation boards/digital displays. The interpretation displays from the cultural strand are assumed to be temporary and therefore, has formed part of the non-monetised assessment

The below tables demonstrate the results on the cost-benefit analysis. The overall Wakefield HSHAZ is assessed to have an **overall BCR of 1.70:1**, considered **‘medium’** value for money ( $1.5:1 < \text{BCR} < 2.0$ ). The cultural strand has a BCR of 1.59:1 and the capital strand has a BCR of 1.70:1.

Table 4-2: Wakefield HSHAZ – Evaluation Summary Table			
	Capital strand	Cultural strand	Total Wakefield HSHAZ
A. Present Value Benefits (£m)	£7.84	£0.17	£8.01
B. Present Value Costs (£m)	£4.60	£0.11	£4.71
C. Net Present Social Value (A-B)	£3.24	£0.06	£3.30
D. BCR (A)/B)	<b>1.70:1</b>	<b>1.59:1</b>	<b>1.70:1</b>
E. VfM category	<b>Medium</b>	<b>Medium</b>	<b>Medium</b>

We have also considered the following non-monetisable benefits using a seven-point scale from ‘large adverse to large significant’ within the MHCLG Appraisal Guide. These non-monetised benefits include:

- **Legacy impacts** – moderate beneficial (important benefit but will not on its own significantly impact on VFM)
- **Image and community perceptions** – moderate beneficial (important benefit but will not on its own significantly impact on VFM)
- **Educational outreach** – slight beneficial (Small benefit unlikely to have material impact on VFM)
- **Cultural sector development** – slight beneficial (Small benefit unlikely to have material impact on VFM)

In conclusion, the overall Wakefield HSHAZ project is likely to represent **‘medium’ value for money** based on the monetised BCR and the non-monetised benefit assessment. The value for money assessment could reach ‘high’ value for money if significant impact and legacy impacts arise in the future, as the BCR alone represents ‘medium’ value for money. The project largely delivered its outputs and is likely to start programme of regeneration in the area.

## 5 Insights, lessons learned, and legacy impacts

As set out in the Purpose of the Case Study section, this document is not an evaluation of the Wakefield HSHAZ scheme. Its main purpose is to review achieved outputs, assess likely value for money, and identify successes and challenges arising from a facilitated workshop.

### 5.1 Key successes

The works delivered by the Wakefield HSHAZ improved the economic vitality of Upper Westgate through building interventions and restoration projects, which have helped to **improve the visual appearance and reduce vacancies in this key gateway**. The scheme has contributed to the stabilisation in the number of vacant shop units, with new commercial, light manufacturing, and residential uses introduced, diversifying the offer of the town centre to both residents and visitors. It should be noted that it has been less than a year since the scheme has completed and some of the outcomes relating to economic vitality cannot be fully measured in this time and are likely to arise as part of the legacy impacts.

Notable successes of the scheme included the purchase of **Pemberton House, ongoing internal repairs at the Black Swan, and shopfront improvements**. The works at 70 Westgate delivered both internal and external works to convert a previous shop into residential units, achieving a key objective of bringing residential units onto the high street. The most successful objective of the HSHAZ scheme involved partnering with property owners to attract future investment into the conservation area for regeneration and conservation projects, which has further engaged stakeholders in the potential for heritage led regeneration.

The Wakefield team were recognised for their **effective management and adherence to the original programme design**, mitigating potential risks and factors that may have restricted successful delivery. Wakefield was also a front runner regarding implementing HSHAZ and HE branding to promote the programme. These materials included banners and window stickers throughout the town and highlighting capital works, spreading the message and increasing engagement of HE and the HSHAZ programme within the community. Significant transformational changes have been observed, with senior management planning to continue and expand these efforts.

### 5.2 Challenges

One of the challenges for the HSHAZ programme was the **general unwillingness and a lack in confidence of building owners** which affected the initial uptake. This issue was worsened due to Covid-19 which significantly impacted businesses, especially those in the evening economy. Rising costs of materials and services may have limited project outcomes and further impacted confidence of grant recipients and potential grant recipients.

Due to rising material and labour costs, it became difficult to manage delivery expectations. Better communication was required to ensure the community was kept up to date with the programme status and timeline.

Initially, bureaucratic hurdles and **lack of priority status for the HSHAZ programme** affected delivery. However, as the project developed and progressed, the benefits of heritage led regeneration were made more apparent and the value of such a programme was realised.

In the third year of delivery, **dissolution of the Cultural Consortium** saw a reduction in cultural activities and engagement. This was the result of overlapping events and reduced officer capacity.

### 5.3 Legacy impacts

The HSHAZ has **contributed to Wakefield’s broader regeneration strategy and Masterplan**. The previously unsuccessful Townscape Heritage bids in Wakefield had impacted on the confidence of new bids. Despite these earlier failures, valuable relationships were developed through delivery of the Wakefield HSHAZ, which will contribute to the future success of heritage regeneration in Wakefield.

One project delivered by the HSHAZ was the production of videos and blogs. These were training videos about the maintenance of HSHAZ projects and heritage buildings in Wakefield. This material will help to ensure the proper care and maintenance of the work already undertaken through the HSHAZ programme and provide an educational resource about the restoration and maintenance of heritage and historical buildings beyond the HSHAZ scope.

Involvement of communities and schools was an ongoing commitment of the Wakefield HSHAZ. **Engaging school children in Wakefield’s heritage** appears to be a legacy impact at this stage, as local schools continue to incorporate history packs and materials regarding Wakefield into the curriculum to enhance historical education and awareness.

### 5.4 Lessons learned

During consultation it was believed that effective internal communication within the local authority was key to establishing relationships with local stakeholders and Historic England. These relationships have the potential to further facilitate collaborative working in Wakefield, with business owners now aware of the potential benefits that can be brought about by schemes such as HSHAZ.

Networking sessions with other HSHAZ projects allowed for the sharing of best practices and successes, including how these successes could help effective delivery of other projects. While these knowledge sharing opportunities were very valuable, more regular training sessions and the opportunities for sharing lessons learned beyond only online events could benefit partner organisations. The team also felt there is a need for **better feedback and evaluation processes to share lessons learned more effectively** across the HSHAZ programme.

Another lesson learned is that future initiatives should limit scheduling capital works during the winter period due to delays and issues related to contractor availability. The hold up of delivery did not fit well with the strict spending restrictions set by Historic England in terms of fixed yearly spending requirements. The requirement for additional administration resource to cover project monitoring is important to consider for future projects. Historic England could look at simplifying reporting requirements, implementing a clear form from the outset.

The culture team at Wakefield Council played a key role in building and leading the cultural consortia. Arts organisations contributed their time for free though they needed additional resource to lead effectively. There has been an **increase in cultural events in Wakefield town centre, but sufficient resources are required to ensure cultural teams are well equipped to deliver** as effectively as possible. Similarly, emphasis was placed as to the importance of strong community partnerships to both support and interact with both capital and cultural initiatives.